

talis



Lyra Programme Check List

May 2006

About this document

The Lyra Programme comprises Talis product upgrades and services, together with actions by library staff. This document summarises what you need to do and when you need to do it.

For more detailed information on the MARC conversion steps, please refer to the MARC Conversion Guide, which you can download from <http://www.talis.com/lyra/conversion.shtml>.

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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Email: <mailto:support@talis.com>

Customer support: <http://www.talis.com/support>

Talis Solutions: <http://support.talis.com/>

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Contents

1. Introduction.....	4
2. Talis Alto and Talis Prism start	4
3. Lyra Programme start	4
4. System preparation.....	4
5. Conversion analysis	5
6. Lyra foundation phase Talis Alto and Talis Prism everywhere	5
7. Bibliographic record conversion	6
8. Lyra completion	6

1. Introduction

This check list is intended to help you plan an orderly and timely course through the Lyra Programme. It summarises what you need to do and when you need to do it.

The Lyra Programme comprises Talis product upgrades and services, together with actions by library staff.

The main goals of the Programme are for your library to move from using the Talis MARC format to the MARC 21 format for bibliographic and authority data, and to have systems that comply with the ISBN-13 standard identifier for book products, which must be used in all trading from 1st January 2007.

For more detailed information on the MARC conversion steps, please refer to the MARC Conversion Guide, which you can download from <http://www.talis.com/lyra/conversion.shtml>.

The deadlines in the check list are the latest dates for any library to carry out the relevant action. Many libraries will have schedules with substantially earlier deadlines for all of these actions.

If you have any questions or problems with any of the actions in this check list, please talk to your Account Manager or email sales@talis.com.

2. Talis Alto and Talis Prism start

Milestone & Actions	Deadline	Note
Install Talis Alto	Now	At least some staff should already be using a version of Talis Alto.
Install Talis Prism	Now	Talis Prism should be the OPAC in at least some parts of your library service.

3. Lyra Programme start

Milestone & Actions	Deadline	Note
Order the Lyra Foundation package	Now	A prerequisite for subsequent actions.
Schedule Lyra training for cataloguing staff	Now	To ensure you get the training when you need it.

4. System preparation

Milestone & Actions	Deadline	Note
Server Health Check passed	End May 06, recommended	Must be scheduled with Talis. Get to passed status by this date.
- Upgrade hardware if recommended		Order as early as possible.
- Schedule database expansion if required		Work to be done by Talis Client Services.
Desktop Operating System up to spec	End May 06, recommended	Minimum requirement: Windows 2000, Windows XP recommended.

5. Conversion analysis

Milestone & Actions	Deadline	Note
Run the marc_analysis script	Summer 06, recommended	Refer to the MARC Conversion Guide for details of actions in this section.
Act on the report	Summer 06, recommended	
Bespoke work arranged, if required	Summer 06, recommended	To convert data not covered in the standard mappings.

6. Lyra Foundation phase (Talis Alto and Talis Prism everywhere)

Milestone & Actions	Deadline	Note
Talis Alto in use for all acquisitions and cataloguing, and linked to Talis Base 2.0	30 Sep 2006	Talis Base 1.0 will be withdrawn on this date. Staff still using Talis Text will not be able to source bibliographic records for orders or new stock.
Talis Alto in use by all staff for all functions; Talis Text decommissioned	End Oct 06, recommended	Prerequisite to Talis Alto 3.0 by December 2006. Talis Text is not supported once the Alto 3.0 upgrade has taken place. Delaying this will condense your timescale for making the move to Talis Alto 3.0 by the end of the year.
Apply the Talis Alto automatic upgrade facility to all PCs and cease use of the manual PC-by-PC install.	End Oct 06, recommended	The automatic upgrade makes it quicker, cheaper and easier to rollout new versions of Talis Alto. If you have not implemented it, you may struggle to rollout the required sequence of upgrades in a timely way.
Upgrade to Talis Alto 2.1.	End Oct 06, recommended	Prerequisite to Talis Alto 3.0. Make sure you have time to get to 3.0 by the end of the year at the absolute latest.
Talis Prism in use exclusively as your OPAC; TalisWeb decommissioned	End Oct 06, recommended; before Talis Alto 3.0 upgrade	Prerequisite to Talis Alto 3.0. TalisWeb is not supported once the Alto 3.0 upgrade has taken place.
Upgrade to Talis Prism 2.0	Optional	It is possible to upgrade to Talis Prism 2.0 before or after Talis Alto 3.0. It is also possible to go straight to Talis Prism 2.1. But, without Talis Prism 2.0 it will <i>not</i> be possible to review the display of MARC 21 records from conversion test runs.
Upgrade to Talis Alto 3.0	31 Dec 2006, absolute latest	Essential for ISBN-13 compliance by this date. Without it, your library's ability to procure, catalogue and circulate new stock will be impaired: any new title with a 13 digit ISBN will not be processed. Also the pre-requisite for bibliographic conversion preparation and testing.

7. Bibliographic record conversion

Milestone & Actions	Deadline	Note
Download and install MARC Conversion Manager 1.0	After Talis Alto 3.0 upgrade	Contact sales@talis.com for details.
Practice and do MARC 21 cataloguing	After Talis Alto 3.0 upgrade	
Identify records for checking in conversion		This can be started now.
Practice converting bibliographic records		Run the MARC Conversion Manager on selected records, and check the results. Consult Talis about any issues or further requirements.
Convert all bibliographic records and sign-off this stage	Before upgrading to Talis Alto 4.0.	Let Talis know that you have completed your bibliographic conversion. It will not be possible to upgrade to Alto 4.0 or higher until the bibliographic conversion has been carried out.

8. Lyra Completion

Milestone & Actions	Deadline	Note
Upgrade to Talis Alto 4.0	Soon after bibliographic conversion, recommended	Prerequisite to building new indexes from your MARC 21 bibliographic records and converting your authority records.
Install new indexing tools & build new indexes from your MARC 21 bibliographic records	Together with Talis Alto 4.0 upgrade	
Convert all authority records and sign-off this stage	Soon after Talis Alto 4.0 upgrade	The process includes authorising your bibliographic record headings and reporting. A prerequisite to using the new MARC 21 authority control features in Talis Alto 4.0, if you already have authority records.
Upgrade to Talis Prism 2.1	Soon after authority record conversion	To have a catalogue that uses the new search system and indexes, with real time updates, and that reflects current authorities for cross-referencing.