



Talis List 2.2

Release Notice

July 2004

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1. Introduction

This document describes how to upgrade your Talis List installation to version 2.2. If you wish to install Talis List from scratch, please contact Talis Support for more information.

1.1 Talis List Version 2.2 enhancements

Please refer to Talis List 2.2 what's new guide for full details of new features and how to use them. This includes the following:

- ◆ **Alerting functionality** for academics and library administrators
- ◆ Introduction of **Subject Librarian** role for alerting
- ◆ Academics able to make "**recommendation for purchase**"
- ◆ New **Stock Management report** for library administrators
- ◆ New **Purchase Request report** for library administrators
- ◆ Improved **Xml import facilities** to automate the update of regularly changing information
- ◆ Extended **entry shopping** for non-TalisLMS catalogues/OPACs
- ◆ **Blackboard Building Blocks** (VLE) integration

In addition we have resolved a number of support issues and reported bugs in the software.

The enhancements include changes to the user interface and will be visible to the academics, course support staff and library system administrators. There are also changes to configuration files, which are relevant to the System Manager.



Warning: Important announcement We have rewritten the entry shopping module in this release, and users of Netscape should be aware that Talis List 2.2 requires Netscape version 7 or later. Earlier versions of Netscape are no longer supported. For instructions on how to upgrade, visit www.netscape.com.

1.2 Supported browser versions

Supported Browsers are:

- ◆ Netscape 7.0(*)
- ◆ Internet Explorer 5.5
- ◆ Internet Explorer 6.0

(*) There is a minor known defect in Netscape 7.02 which prevents the edit window popping to the front when the **Add+Edit** button is used. The suggested work around is to switch to the edit window using either the mouse or the alt and tab keys.

2. Installing Talis List

2.1 Prerequisites

Before running the Talis List 2.2 upgrade please ensure:

- You are currently running Talis List 2.01. If you are still running Talis List 1.0 the upgrade program will not allow the upgrade to take place
- You have enough spare disk space in **/scratch**. It is recommended that at least 20MB is available.

2.2 On the day of the upgrade

Carry out a `full_softdump` to backup the existing Talis and Talis List software.

Use `full_dbdump` to backup the relevant databases. If you are upgrading your main Talis List system you will need to dump the master and `prod_list` databases using the command **`full_dbdump -dprod_list`**. If you are upgrading your tutor Talis List you should dump master and `tutor_list` using the command **`full_dbdump -dtutor_list`**. This is essential as the existing Talis List software is secured to `/scratch` during the upgrade.

Check the `/users/talislist/.profile` and ensure that no programs are automatically started by it. Disable automatic start if any are found.

It is not necessary to do any of the following before commencing the upgrade:

- Disable the root cron
- Set nologin
- Backup the software to disk
- Terminate any daemons
- Stop Tomcat

2.3 Collecting the upgrade files

The Talis List upgrade files should be downloaded from the Talis ftp site the day before the planned upgrade.

1. Log onto the system as the 'talislist' user
2. Enter your 'talislist' password when asked
3. Check if the upgrade directory exists:

```
cd /scratch
```

```
ls -ld upgradeTalislist_2.2
```

4. If the directory is not found then make an empty directory called `upgradeTalislist_2.2` under `/scratch` and change into it:

```
mkdir /scratch/upgradeTalislist_2.2
```

```
cd /scratch/upgradeTalislist_2.2
```

Move into the directory and remove all old files:

```
rm -rf *
```

5. Download the java archive file **`talislist_v22_upgrade.jar`** and the scripts **`talislist_v201_v22_application_upgrade.sh`** and **`talislist_v201_v22_database_upgrade.sh`** from the Talis ftp server as follows:

```
ftp ftp.talis.com
```

6. If you are unable to access the ftp server by name try using the following command at the `ftp>` prompt:

```
open 194.80.17.40
```

7. Log in using your member login and password and enter the following commands:

```
cd talislist2.2
```

```
prompt
```

```
bin
```

```
mget *
```

8. Once the files have arrived log off the ftp server:

quit

9. Finally, check the sizes are the same as though listed on the ftp server:

```
-rwxrwxrwx 1 support admin 7262056 Jul 19 12:32 talislist22.jar
-rwxrwxrwx 1 support admin 4570 Jul 19 12:32 talislist_v201_v22_application_upgrade.sh
-rwxrwxrwx 1 support admin 25549 Jul 19 12:32 talislist_v201_v22_database_upgrade.sh
```

The application upgrade script should be put on the machine hosting the Talis List application and Tomcat. The downloaded java archive file should also reside on this machine.

The database upgrade script should reside on the machine, which hosts the Talis List database.

3. Upgrading the database

1. Make sure that you are logged in as the talislist user

su – talislist

If this prompts you for a password then enter your unix talislist password.

2. Make sure that you are in the correct directory. Enter the following commands:

```
cd /scratch/upgradeTalislist_2.2
```

```
./ talislist_v201_v22_database_upgrade.sh
```

3. You will be prompted for the following:

- The name of the Talis List database you wish to upgrade e.g prod_list
- The entry TYPE_IDS of Prism entries if the system is configured to shop from Prism. You will be given a range of TYPE_IDS to choose from.

4. Select the one corresponding to Prism. If you do not use Prism, choose the -1 option.

4. Upgrading the application

1. Make sure that you are logged in as the talislist user

su – talislist

2. If this prompts you for a password then enter your unix talislist password.

3. Make sure that you are in the correct directory. Enter the following commands:

```
cd /scratch/upgradeTalislist2.2
```

```
./ talislist_v201_v22_application_upgrade.sh
```

4. You will be prompted for the following:

- The Talis List installation to be upgraded (talislist or tutor_talislist)
- The path to the downloaded java archive – including the filename (**talislist_v22_upgrade.jar**) e.g. **/scratch/upgradeTalislist_2.2/ talislist_v22_upgrade.jar**

The command prompt will appear when Talis List has successfully upgraded. If any messages appear, please contact Talis Support.

5. Shopping configuration

Following installation of the upgraded application, some configuration of entry shopping may be required.

If Talis List uses TalisWeb as its primary OPAC, no further configuration is required.

If Talis List uses Talis Prism as its primary OPAC, the correct URL must be added to the **<talislist_home>/WEB-INF/conf/recognisers/prism.conf** configuration file. This is a standard java properties file, two of the properties it specifies require changing. The correct DNS or IP address should be inserted into the properties.

That is:

com.talis.talislist.recogniser.url.recognise

becomes:

com.talis.talislist.recogniser.url.recognise: http://123.123.123.222

Similarly:

com.talis.talislist.recogniser.element.mask.harvesturl

becomes

**com.talis.talislist.recogniser.element.mask.harvesturl:
http://123.123.123.222/TalisPrism/doOpenURLSearch.do?foo/TalisPrism/doOpenURLSearch.do?sid=Prism:Talis&pid=Key%3A<element1>%3BArtifactType%3A<element3>%3BsearchLocation%3A<element4>&talislistxml=on**

In both cases, ensure that only the host:port element of the existing url is changed (i.e. keep the http:// and anything following the first '/').

6. Permissions

A set of new permissions are included in the 2.2 version of the Talis List permission file, **<talislist_home>/WEB-INF/conf/permissions.conf**.

The last 4 lines in each user section relate to the new reporting functionality

```
permissions.usertype1.V_REPORTS false
permissions.usertype1.V_REPORT_SELECTION false
permissions.usertype1.V_OWNER_NAVIGATOR false
permissions.usertype1.V_ADMIN_NAVIGATOR false
```

They are all set to false by default. These will need to be switched on according to the particular specification of the installation.

If you intend to upgrade both your live and tutor Talis List systems the upgrade script will need to be run twice, once for each Talis List system.

7. Blackboard VLE integration

An optional component of Talis List 2.2 is a Blackboard Building Block to facilitate easy integration between Talis List and Blackboard VLE. This integration component provides a link to allow VLE users to view (and, in the case of academic users, edit) resource list information relevant to a specific course without leaving the VLE environment.

This component can be downloaded from <ftp.talis.com> in a bundled zip file.

7.1 Installation

1. Download the zip file containing the Blackboard integration component (talislislist.zip) into the /scratch directory.
2. Download the configuration script (configure.sh) into the /scratch directory.
3. Set the file permissions:


```
chmod 755 talislislist.zip
chmod 755 configure.sh
```
4. Run the configuration script. This will configure the Building Block to allow socket connections between Blackboard VLE and your Talis List server. You will be required to enter the IP or DNS name and port of your Talis List server.
5. Run the configuration script:


```
./configure.sh
```
6. Once the configuration script has completed, follow the standard installation instructions for Blackboard components.

7.2 Maintaining links between Talis List and the VLE

The logical linkage between Talis List and the VLE is based upon corresponding course codes. This requires that courses codes in Talis List must map directly to those in the VLE. Similarly, to allow academic users to edit their resource lists from within the VLE, synchronicity must be maintained between the Blackboard and Talis List login names

8. Talis List XML Import Routine

A separate (command line) batch application is now available to enable specific data to be imported and updated from external systems (VLEs, registries, etc). Typically this would be used to load FTE or PTE student numbers, or staff names, on a regular basis to ensure accuracy. The application is intended for use by System Managers, as a scheduled job to be run at a convenient time.

Using the new application, any element(s) of data can be loaded from an xml file (assuming that a primary key is also present to ensure data is loaded correctly). For those items which are NOT supplied in the uploaded file, you have the option to configure the system to either overwrite the existing data item held with a default value, OR to leave the existing data as it is.

The Talis List XML import routine is a new feature in version 2.2 of Talis List. It allows course, list, entry and user data to be imported into the Talis List database from XML files. Imports can either insert new data or update existing entities. The formats of the required XML documents are detailed below.

8.1 Defaults document

The **defaults** file is an XML tagged file with a 2-level grouping.

```
< Group-Name>                                XML tag-start for the group
  < Field-Name 1>80008836</ Field Name-1> XML tag-start + data + XML tag-end for the 1st field
  < Field-Name 2>SMITH</ Field Name-2>   XML tag-start + data + XML tag-end for the 2nd field
  < Field-Name 3>LESLEY J</ Field Name-3> XML tag-start + data + XML tag-end for the 3rd field
  < Field-Name 4>Mrs</ Field Name-4>     XML tag-start + data + XML tag-end for the 4th field
  < Field-Name 5>0</ Field Name-5>      XML tag-start + data + XML tag-end for the 5th field
</ Group Name>
```

The defaults document is used when carrying out inserts of new data into the Talis List database. For each entity being imported (course, list, entry, user) the defaults document will be used to provide a value for any field that does not have a value specified in the data document. If no value is provided in the defaults document, a null value will be inserted into the database table. See the attached table for which fields do not allow nulls and so must derive a value from either the data or defaults document.

The example defaults file (defaults.xml) shows various group/field combinations.

8.2 Data document

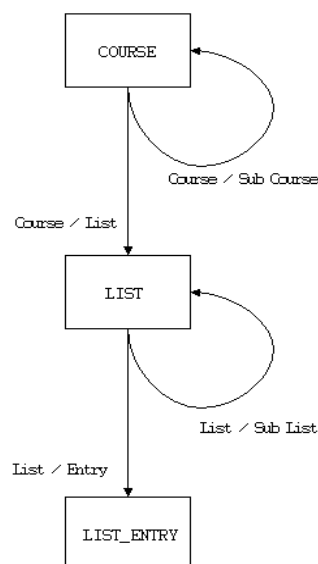
The table in [Appendix A](#) shows the available “**Group Name**” (XML) tags found in the data file and their corresponding “**Field Name**” tags.

Each “**Group Name**” value reflects the name of the principal Talis List Sybase table that is affected by the data within the group and the **Field Names** (in the main) reflect the corresponding Sybase column that is affected within that table. The exception to this pattern is the COURSE field of the USER group. This field is used to specify a relationship of either course owner or contributor between the user entity and a particular course (referenced by COURSE_CODE) The COURSE field has an attribute, RELATIONSHIP, with two possible values, 0 for owner and 1 for contributor. The field value of COURSE should be the COURSE_CODE of the course with which the relationship exists.

Multiple COURSE fields are permitted in the USER group.

The hierarchical relationship between courses, sub-courses, lists, sub-lists and list entries is easily represented in XML by the use of nested elements. For example, a valid element of a COURSE group is COURSE. This denotes a course / sub course relationship. Similarly, LIST elements may be nested to show a list / sub-list hierarchy. The correct hierarchy of entities is shown in fig 1.

Fig.1 Entity hierarchy in import XML document.



8.3 Insert and update modes

As mentioned above, the Talis List XML import routine can be used to insert new courses, lists, entries and users or amend existing ones. The COURSE, LIST and USER entity elements in the data document, provide

the mechanism for specifying which mode to operate in. Each of these element tags have an attribute, ACTION, which has two valid values, insert and update. At present there is no method for updating ENTRIES, only inserting new ones.

In insert mode if an already existing course is specified (via course code) no action will be taken. That is, neither the course nor any of its children in the XML document will be created or modified in the Talis List database.

In both insert and update modes, at least a course code must be specified for each course in the XML document. In insert mode, any fields not specified will be either populated from the defaults document or with nulls as appropriate. In update mode, only those fields explicitly specified in the data document will be updated.



Note: If updating users, please ensure that all user / course relationships are specified in the data document as all existing relationships for the specified users will be dropped from the database and replaced with those specified in the data document.

9. Entry shopping from non-Talis OPACs.

The entry shopping facility has been enhanced to ensure interoperability with a wider range of sources, for example non-Talis Library Management Systems and journal databases. This means that academics or list creators can add entries to their lists from other OPACs or similar, just as easily and reliably as they can at present add from the Talis catalogue.

We are working closely with members of Talis's "Integration Partners Program" to ensure this interoperability (IPP members are HE institutions with non-Talis LMSs who are implementing Talis List for their resource lists). If you want to make a wider range of sources or other non-Talis OPACS available to your academics or list creators for entry shopping, please contact the Talis Support to discuss the support and consultancy we can offer to help.

10. Resolved Support calls

The following support calls have been resolved in Talis List 2.2

Number 23

In Talis List 2 when you added an alternative entry with the type set to anything but "passive", the entry was added as a main entry rather than an alternative entry. Now fixed. (Call ref: SH 1-1159801)

Number 24

Context-sensitive help pages in Talis List 2 were not being displayed and any attempt to display any help page returned the initial public html help screen. Now fixed. (Call ref: SH 1-1238101)

Number 30

There was a problem with bulk Delete/Move/Copy/Update actions on Reading List contents, where the resultant url (which is built up as each entry is checked) exceeded IE capabilities (bug number 30). This has been addressed by monitoring the url string as each entry is checked, and posting an alert message to inform the user when the maximum number of entries have been selected. The message is configurable. Now fixed. (Call Ref: SH 1-1477122, UP 1-1521801)

Number 32

On Internet Explorer, the print preview screen was not displaying correctly on PCs with screen resolutions of 800x600 or lower. (The preview page took up the entire screen, preventing access to the buttons at the bottom of the page.) Now fixed. (Call ref: SH 1-1194801)

Number 34

Resolved the problem where the print function did not print the essential and recommended material as defined in Talis List. Now fixed. (Call Ref: BI 1-1454704, SH 1-1545501)

Number 35

Resolved the print problem which was printing truncated course titles and sub lists when a list is printed from Talis List. Now fixed. (Call Ref: SH 1-1545501)

Number 37

Deleting a Top Level course was very time consuming as Talis List attempted to re-sequence all Top Level Courses with a COURSE_ID larger than the one assigned to the Course being deleted. Re-sequencing now only takes place if the course is not a top level course. Fixed. (Call Ref: UP 1-1738101)

Number 39

Resolved the issue whereby a max of 23 entries could be edited, as per issue number 30 above. Now fixed (Call Ref: WP 1-1800201)

Appendix A

This appendix the available “**Group Name**” (XML) tags found in the data file and their corresponding “**Field Name**” tags.

ENTITY	FIELD	FORMAT	MANDATOR Y	DESCRIPTION
COURSE	COURSE_CODE	CHAR(20)	Y	Unique identifier for course entity
	COURSE_STATUS	INTEGER	N	Link to TYPE_STATUS table for SUB_TYPE 207
	PERIOD_ID	INTEGER	N	A valid ID from the PERIOD table
	COURSE_TITLE	CHAR(255)	N	
	COURSE_ANALY	CHAR(20)	N	
	COURSE_FSTUDS	INTEGER	N	
	COURSE_PSTUDS	INTEGER	N	
	STAFF_NOTE	CHAR(200)	N	
	COURSE_NOTE	INTEGER	N	
	COURSE_DESCRIPTION	CHAR(255)	N	
	EXPIRES	DATE (YYYY-MM-DD)	N	

ENTITY	FIELD	FORMAT	MANDATORY	DESCRIPTION
LIST	LIST_STATUS	INTEGER	N	Link to TYPE_STATUS table for SUB_TYPE 207
	PERIOD_ID	INTEGER	N	A valid ID from the PERIOD table
	LIST_TITLE	CHAR(255)	N	
	EXTERNAL_URL	INTEGER	N	
	AVAILABLE_DATE	DATE (YYYY-MM-DD)	N	
	STAFF_NOTE	CHAR(200)	N	
	PROCESS_STATE	INTEGER	N	
	LIST_DESCRIPTION	CHAR(255)	N	
	EXPIRES	DATE (YYYY-MM-DD)	N	
LIST_ENTRY	TYPE_ID	INTEGER	N	TYPE_ID link to ENTRY_TYPE table
	ENTRY_STATUS	INTEGER	N	Link to TYPE_STATUS for SUB_TYPE 207
	PROCESS_STATE	INTEGER	N	Link to TYPE_STATUS for SUB_TYPE 208
	ENTRY	CHAR(255)	N	The text of the entry
	CATEGORY	INTEGER	N	Link to TYPE_STATUS for SUB_TYPE 205
	PRE_TEXT	CHAR(255)	N	
	POST_TEXT	CHAR(255)	N	
	URL	CHAR(255)	N	

ENTITY	FIELD	FORMAT	MANDATORY	DESCRIPTION
	ENTRY_DATA	CHAR(255)	N	The work ID of the entry if applicable
	STAFF_NOTE	CHAR(200)	N	
	ISSN ISBN	CHAR(10)	N	
	DATA_ELEMENT_1	TEXT	N	
	DATA_ELEMENT_2	TEXT	N	
	DATA_ELEMENT_3	TEXT	N	
	DATA_ELEMENT_4	TEXT	N	
	DATA_ELEMENT_5	TEXT	N	
	REQUEST_COMMENT	CHAR(255)	N	
	SPECIAL_REQUEST	INTEGER	N	
USER	LOGIN_NAME	CHAR(60)	N	
	SURNAME	CHAR(60)	N	
	FORENAME	CHAR(60)	N	
	PREFER_NAME	CHAR(60)	N	
	PASSWORD	CHAR(10)	N	Users password in unencoded format
	TYPE	INTEGER	N	USER_TYPE_ID link to USER_TYPE
	STATE	INTEGER	N	Link to TYPE_STATUS for SUB_TYPE 211
	STAFF_NOTE	CHAR(200)	N	
	TITLE	INTEGER	N	Link to TYPE_STATUS for SUB_TYPE 212
	ALERTS	INTEGER	N	
	EXTERNAL_REFERENCE	CHAR(30)	Y	

ENTITY	FIELD	FORMAT	MANDATORY	DESCRIPTION
	COURSE	CHAR(20)	N	Course code should be specified by field value relationship attribute determines type, as a link to TYPE_STATUS table for SUB_TYPE 210 i.e. 0 = Owner, 1 = Contributor