



# **Talis Source**

## **Data Contribution Guidelines**

**May 2006**

## About this document

This document provides information about the Talis Source Contribution process. It is intended for librarians and system managers.

For more information about Talis Source, go to <http://www.talis.com/source>.

## 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

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

Tel: +44 (0)870 400 5400

## General enquiries

Tel: +44 (0)870 400 5000

Fax: +44 (0)870 400 5001

Email: [info@talis.com](mailto:info@talis.com)

Internet: <http://www.talis.com/>

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# 1. Contributing data to Talis Source

These data contribution guidelines introduce both librarians and system managers to the Talis Source contribution process. Should you have any further questions, or if this is your first contribution attempt and you require dedicated support, please e-mail our team ([holdings@talis.com](mailto:holdings@talis.com)) who will be able to help you further.

## 1.1 When

You can contribute data to Talis Source at any time. Since it is an online service, it is updated continuously. But it may suit you to establish a schedule for your data contributions.

## 1.2 Conformance to specifications

It is important that when you contribute data, it conforms to the specifications below (Data types, File and record formats, File naming convention, Transmission media). This conformation will largely be done automatically if you contribute through Talis Source, or use Talis LMS. If you have any problems, or want to discuss providing exports in other formats not listed, please contact Talis.

## 1.3 Control numbers

Types of control number: prefer ISBN, else BNB, else LC, else other.

## 1.4 Contribution Reports

You can find information about your contributions in “Admin: Results” or, for an overview of all contributions, via the Home page.

## 1.5 Location Code

Talis assign each contributor with a location code. Should you need a code assigned, or have forgotten your code, please contact Talis.

# 2. Data types

The data type determines the actions that will be performed when applying the data to the Talis Source database. You specify the data type in the file name.

## 2.1 Full Dump

A ‘Full Dump’ should represent your entire catalogue. It can be in any of the file and record formats, so it may contain either control numbers only (all types) or full bibliographic records. A ‘Full Dump’ must represent the holdings of only **one** location. The location code is specified in the file name.

On processing, all holdings for the specified location will be deleted from the Talis Source database and a new holding will be added for each record in the ‘Full Dump’ file.

## 2.2 Full Dump ISBN Only

A ‘Full Dump ISBN Only’ should contain only records where the item number is an ISBN. It should represent all records in your catalogue that have ISBNs. It can be in any of the file and record formats, so it may contain either control numbers (ISBNs) only or bibliographic records.

A 'Full Dump ISBN Only' must represent the holdings of only one location. The location code is specified in the file name. All holdings for the specified location where the Item number is an ISBN will be deleted from the Talis Source database. A new holding will be added for each record in the Full Dump ISBN Only file.

## 2.3 Additions & Deletions

An Additions & Deletions file should represent all additions and deletions made to your catalogue since your last contribution to Talis Source. It must be in the Notify format, because that is the only format where the file can contain a mixture of addition and deletion records.

An Additions & Deletions file may represent the holdings of multiple locations, but only if a specifically agreed file name is used (see the File naming convention section).

For each record in the file a holding is added or deleted in Talis Source according to the Record status and the Location code given in the record.

## 2.4 Additions

An Additions file should represent additions made to your catalogue since your last contribution to Talis Source. It can be in any of the file and record formats, so it may contain either control numbers only (all types) or bibliographic records. Of course, you will probably also need to contribute a Deletions file.

An Additions file must represent the holdings of only one location, specified in the file name, unless it is in the Notify format and only if a specifically agreed file name is used (see the File naming convention section).

For each record in the file a holding is added to Talis Source according to the specified location.

## 2.5 Deletions

A Deletions file should represent deletions of titles in your catalogue since your last contribution to Talis Source. It can be in any of the file and record formats, so it may contain either control numbers only (all types) or bibliographic records. Of course, you will probably also need to contribute an Additions file.

A Deletions file must represent the holdings of only one location, specified in the file name, unless it is in the Notify format and only if a specifically agreed file name is used (see the File naming convention section).

For each record in the file a holding is deleted from Talis Source according to the specified location.

## 3. File and record formats

Each file of data that you contribute to Talis can contain records formatted according to the following permitted record format specifications (Also see "3.6 Other Formats" for more info). The data file must not contain any other data, such as header or trailer information, or notes about the data.

Record delimiters or terminators must not be given unless specified in the record format.

The file must be a text file - if using a word processor such as Word to enter data, the file must be saved as a text file.

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**i** **Note:** We only automatically accept (via ftp) the following file/record formats. If you wish to provide a format not listed, please contact us at [holdings@talis.com](mailto:holdings@talis.com)).

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### 3.1 Notify format

Files of records in the Notify format are produced by the PC program Notify and by the holdings notification export software of various library systems.

Records are not delimited - nothing is used to separate one record from another.

A file of Notify format records can include both addition and deletion records, because the format includes a Record status.

Multiple locations can be represented in one file of Notify format records, because the format includes a Location code.

Character set: ASCII.

Data element	Position	Size	Value range
Control number	0-9	10	Alphanumeric, left justified and filled with blanks.
Location code	10-13	4	Numeric. 1 <sup>st</sup> digit indicates region; digits 2-4 indicate location within region.
Loanable	14	1	L(=Loanable) R(=Reference / not for loan) blank(=undetermined)
Record status	15	1	A(=Addition) D(=Deletion)
Undefined	16-19	4	Blank

## Example

```
'AB000123 7021 A '
```

The quotation marks are for illustration only, they are not part of the record. This record has

- An item number of 'AB000123' with two trailing blanks to make 10 characters
- A location code of '7021'
- A blank Loanable indication – undetermined
- Record status 'A' – it is an addition
- Four blanks for the undefined part of the record.

## 3.2 Item number list format

The Item number list format is simply a control number followed by a carriage return and line feed (decimal ASCII codes 10 and 13). When entering the data in a text editor, carriage return and line feed are produced by pressing Return.

A file of Item number list format records must represent either additions or deletions, not a mixture, because the record format does not provide for a record status. You indicate the status in the file name.

Only one location can be represented in one file of Item number list format records, because the record format does not provide for a Location code. You indicate the location in the file name. Character set: ASCII.

## 3.3 UKMARC format

This format enables you to contribute bibliographic data. Talis Source also takes each UKMARC record to represent a holding.

A file of UKMARC format records must represent either additions or deletions, not a mixture, because Talis Source does not take account of the UKMARC Record status. You indicate the status in the file name.

Only one location can be represented in one file of UKMARC format records, because Talis Source does not examine the record for a Location code. You indicate the location in the file name.

Please refer to the UKMARC Manual for the record specification. Please note that we will validate all UKMARC contributions against this specification.

### 3.4 MARC21 format

As detailed for 3.3, but applicable to MARC21 bibliographic contributions. Please note that we will validate all MARC21 contributions against this specification.

### 3.5 LinkUK format

The LinkUK format is produced and maintained by OCLC, and can be used for contributing into the Talis Source system. For more information on this standard, please contact your LinkUK representative.

### 3.6 Other formats

Should you not be able to supply data in the preferred formats listed, please email Talis ([holdings@talis.com](mailto:holdings@talis.com)). We will be pleased to analyse a sample of your data, and work with you to determine a method of importing that into the Talis Source data store.

## 4. File naming convention

### 4.1 The standard

All files contributed to Talis Source must have a standard file name. It gives all the required information about the file and eliminates the need for covering forms or other written details to accompany the file.

The file name is made of four elements, as follows. It can be in upper case or lower case.

Element name	Value												
Location	A four-digit region location code. The first digit denotes the region. (See '1.5 – Location Code' for more info)												
Data Type	One of the following three character codes <table border="1" data-bbox="432 1543 903 1798"> <thead> <tr> <th>Code</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>FDA</td> <td>Full Dump</td> </tr> <tr> <td>FDI</td> <td>Full Dump ISBN Only</td> </tr> <tr> <td>ADL</td> <td>Addition &amp; Deletion</td> </tr> <tr> <td>ADD</td> <td>Addition</td> </tr> <tr> <td>DEL</td> <td>Deletion</td> </tr> </tbody> </table>	Code	Meaning	FDA	Full Dump	FDI	Full Dump ISBN Only	ADL	Addition & Deletion	ADD	Addition	DEL	Deletion
Code	Meaning												
FDA	Full Dump												
FDI	Full Dump ISBN Only												
ADL	Addition & Deletion												
ADD	Addition												
DEL	Deletion												

Element name	Value												
Format	One of the following codes. Note that each code begins with a dot (full stop).												
	<table border="1"> <thead> <tr> <th>Code</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>.NOT</td> <td>Notify</td> </tr> <tr> <td>.LST</td> <td>Item number list</td> </tr> <tr> <td>.BEX</td> <td>UKMARC</td> </tr> <tr> <td>.LUK</td> <td>LinkUK</td> </tr> <tr> <td>.LEX</td> <td>MARC21</td> </tr> </tbody> </table>	Code	Meaning	.NOT	Notify	.LST	Item number list	.BEX	UKMARC	.LUK	LinkUK	.LEX	MARC21
	Code	Meaning											
	.NOT	Notify											
	.LST	Item number list											
	.BEX	UKMARC											
.LUK	LinkUK												
.LEX	MARC21												
Sequence Number	A three-digit number preceded by a dot (full-stop). .001, .002, etc. This is optional but highly recommended, to uniquely identify each file that you contribute and its position relative to your other contributions. It is independent of format - you should increment the sequence number for each file that you contribute, regardless of the format it is in.												

## Example file names

7021ADD.BEX.001	= Vale of Glamorgan Additions in UK MARC format
7021	= Vale of Glamorgan
ADD	= Additions
.BEX	= UK MARC format
.001	= The first data contribution
1124FDA.LST.001	= Salisbury College Full Dump in Item Number List format
1124	= Salisbury College
FDA	= Full Dump
.LST	= Item Number List format
.001	= The first data contribution
0011ADL.NOT.012	= Oldham Additions & Deletions in Notify format
0011	= Oldham
ADL	= Additions & Deletions
.NOT	= Notify format
.012	= The twelfth data contribution

## 4.2 Exception for Notify users

If you use the Notify software to enter holdings notifications, you may contribute files with the file name generated by the software. However, be sure to combine the various Notify sessions before contributing the data. If you transmit the data by FTP, only the data file should be sent - this file has a .CMT extension.

## 4.3 Contributing files for multiple locations

Regional and national offices and other organisations may want to contribute files with data from more than one location. These must be Notify format files. The file names must contain alphabetic characters only, apart from the Sequence number, and they must be agreed in advance with Talis. Below is the list of currently acceptable file names.

- NWRLS.NOT.001
- SWRLS.NOT.001
- NLS.NOT.001
- IN.NOT.001
- EMRLS.NOT.001

- IREL.NOT.001
- YLI.NOT.001
- CCIW.NOT.001
- WM.NOT.001
- LASER.NOT.001
- FOSITE.NOT.001

## 5. Transmission media

There are two preferred ways of transmitting data contributions to Talis Source - Web and FTP. Alternative transmission methods must be by arrangement with Talis. Files may be zipped for transmission, as the update process will automatically unzip .zip files.

### 5.1 Web

Talis Source allows ADD/DEL files to be transmitted online. Go to Admin, and select “Database Contributions”.

### 5.2 File Transfer Protocol (FTP)

This is the preferred method for larger files. You ‘put’ your file onto the Talis FTP server. Please contact Talis for the address and login details.

### 5.3 Alternative ‘non-preferred’ methods

Talis can also accept contributions via email, or on various optical/magnetic media (Tape, CD, etc). To discuss this further, contact Talis via phone or by email ([holdings@talis.com](mailto:holdings@talis.com)).