

Final report
on the works performed at ICIE for upgrading
WWW-ISIS-ASFA

Warsaw, February 2005

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1. Introduction

According to the Terms of reference for LOA between FAO and ICIE, the “upgrade” project was intended to continue the development of the www-ISIS-ASFA software by means of a “*minor upgrade*”, and should result with a new release of the software. The “upgrade” of WWW-ISIS-ASFA was conceived as including some improvements and corrections for most of the errors or bugs that have been so far uncovered by FAO and ASFA partners during data input. Additionally, it incorporated updates to some of the pick-lists contained in the software. The list of upgrade requests has been grouped into the following tasks :

1. List A – has covered minor problems concerning errors and mistakes in some files of the system that have been identified at earlier stage of the system release and had to be corrected. Additionally within this group of tasks the proposals of the FAO staff for upgrading the validation formats have been taken into account
2. List B has referred to the general problem of special characters
3. List C addressed minor inconsistencies and proposals for upgrading formats (spelling errors), and the user interface, as requested by the ASFA partners
4. A special program (wizard) has been foreseen as to replace the DOS ISIS export.

A detailed check-up table for all fixed drawbacks and implemented new features is provided in the Annex 1 in the form of Table A1. Below we provide a brief description of the works in the task groups listed above and explain how the goals of the project have been implemented.

2. Prerequisites

The main concern was to prepare the upgraded version that the distribution among the ASFA partners should not become a real problem neither for the FAO staff, who will be involved in the distribution process, nor for the partners, that have to perform a set of tasks in order to upgrade the software.

The upgrade project was limited by the following prerequisites:

1. The changes should minimize work for upgrading the users manuals
2. The upgrade procedure should be run automatically as much as possible
3. The upgrade procedure should not create problems to the ASFA partners.

Solution

In order to achieve these goals it has been decided that the upgrade procedure is integrated with the installation procedure. It means that the partners wishing to upgrade their installations have to run the same procedure they already know from the previous installation. The new procedure will automatically upgrade all necessary files. The procedure is safe for the partners' ASFA data – it works in such a way that the existing ASFA database will not be replaced by an empty one.

Note: In the new Installation/Upgrade procedure there is only one screen which is different from the one in the previous installation procedure. The screen does not appear during the first installation of the system. **It appears only when an upgrade is run. A special window is shown informing that the ASFA database has been detected but would not be removed. Only the formats would be upgraded** (see figure below). The screen appears after Step 7, screen 4th (as in the Installation Manual).

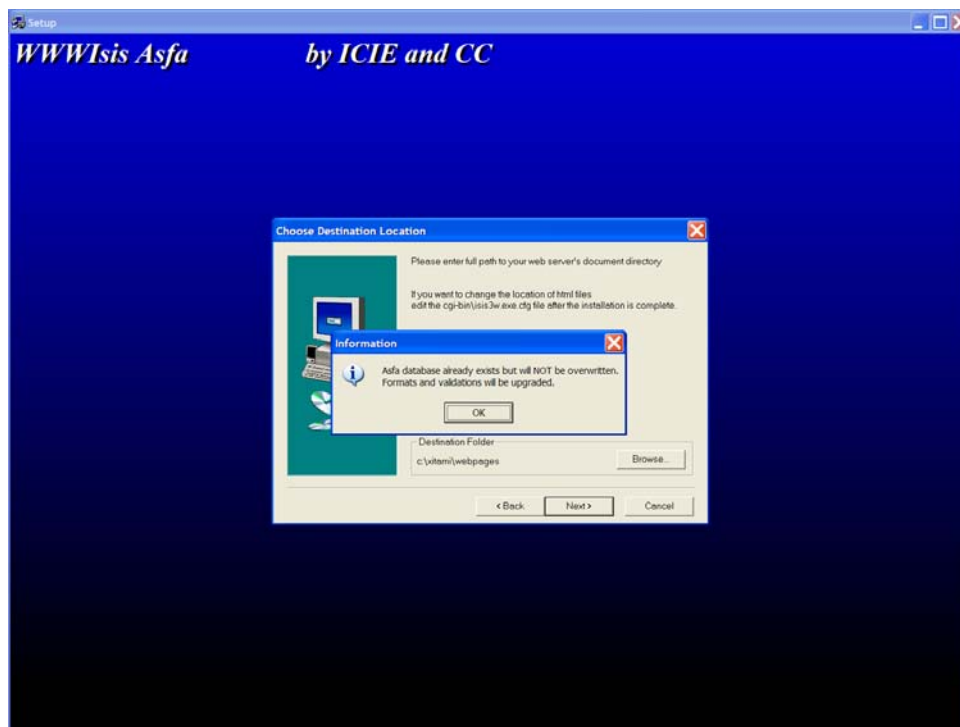


Fig. 1

3. New features of the software

3.1 New Isis3w.exe

As some of the tasks concerning the software upgrade required using the newest release of WWW-ISIS, it has been decided that the new isis3w.exe program should be used for the new release of WWW-ISIS-ASFA.

For this reason the search and browse tables have been rewritten to the new XML-like style.

Implications:

1. It is now possible to perform export within WWW-ISIS-ASFA according to the format specified by CSA.FST;
2. The History in the search module shows the number of search results;
3. It is now possible to run export for a query built in History screen

The new screens for exporting data from WWW-ISIS-ASFA are shown on Fig. 2 and 3

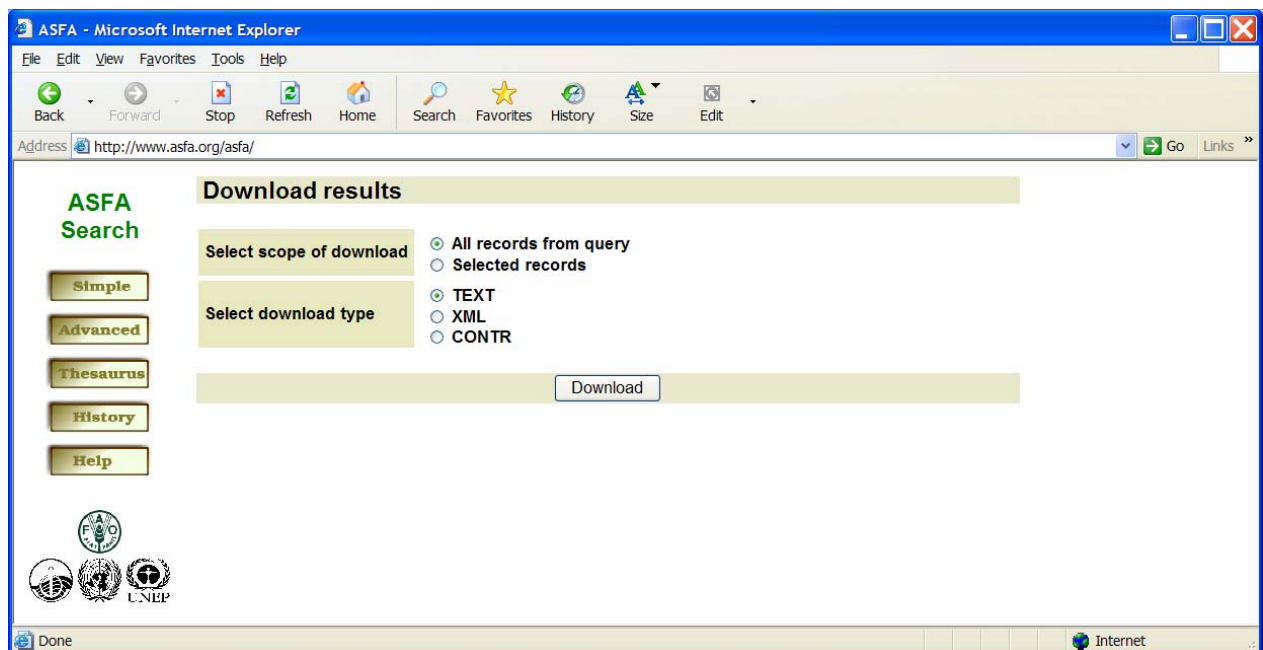


Fig.2 The screen for downloading search result

As one can see for exporting ISO2709 there is no possibility to export data in ISO-2709. Instead, there is a possibility to export XML.

Note: This function requires connecting to Internet.

Note 2: For the new export procedure see p. 3.2. The function should be rather used for exchange of data between cooperating centers.

A similar possibility is provided for exporting a range of records. This is shown on Fig. 3 below.

Note: As above, with this function it is not possible to export ISO2709. For the new export procedure see p. 3.2.

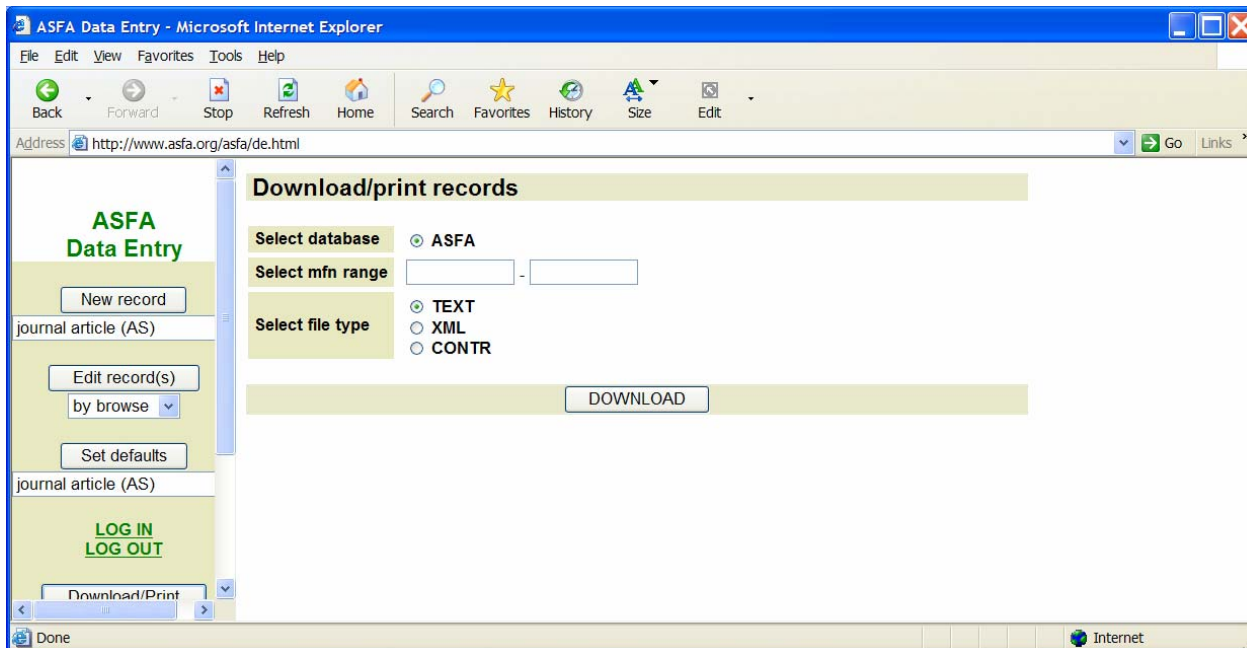


Fig.3 The screen for downloading search result

3.2 New export procedure

The new Installation/Upgrade procedure provides a new program for performing all necessary activities for exporting a set of records to CSA. The link to the program is now located on the WWW-ISIS-ASFA folder on the desktop.

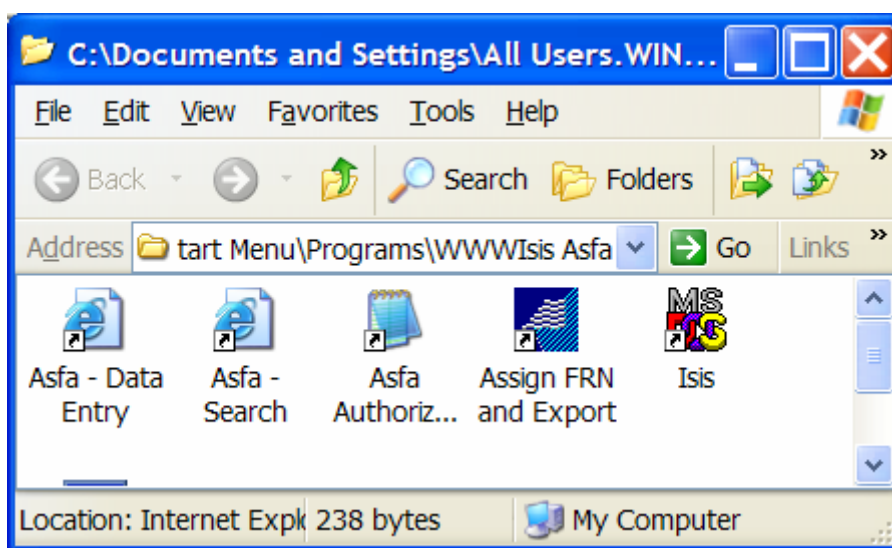


Fig. 3 New WWW-ISIS-ASFA folder

Below a procedure for exporting records to CSA is sketched.

To export a batch of records to the publisher (CSA) perform the following:

Check if all records to be exported in a selected range of records [are completed](#) (uncompleted records are marked as T-temporary);

If necessary, complete all the records within the range to be exported;

After having completed all uncompleted records **use the procedure "Assign FRN and export" in the WWW-ISIS-ASFA folder** to export records from ASFA database. In order to start it just click on the link "Assign FRN and export".

STEP 0:

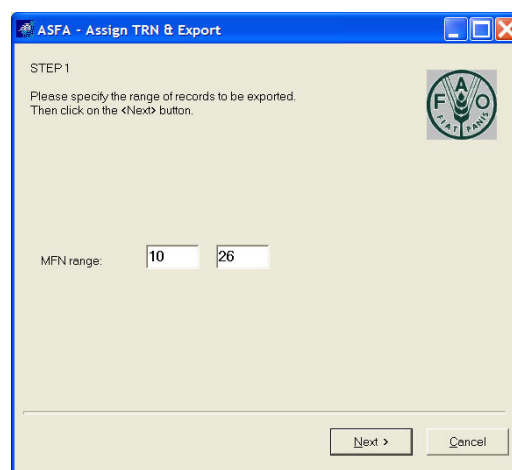
Open the WWWIsis ASFA folder icon located on the desktop of the WWW-ISIS-ASFA server (double-click on the icon **Assign FRN and Export**)



STEP 1:

Enter the range of MFNs to export. The default value of the lowest MFN is the last exported MFN+1, whereas the upper value is the last entered MFN.

Then click Next button.



STEP 2 (fail):

If there are any uncompleted records in the specified range you will see the error message box. At this point you cannot continue exporting in the given range. Click OK and then CANCEL the procedure. Check again which records have to be [completed](#) and perform the update with WWW-ISIS-ASFA.



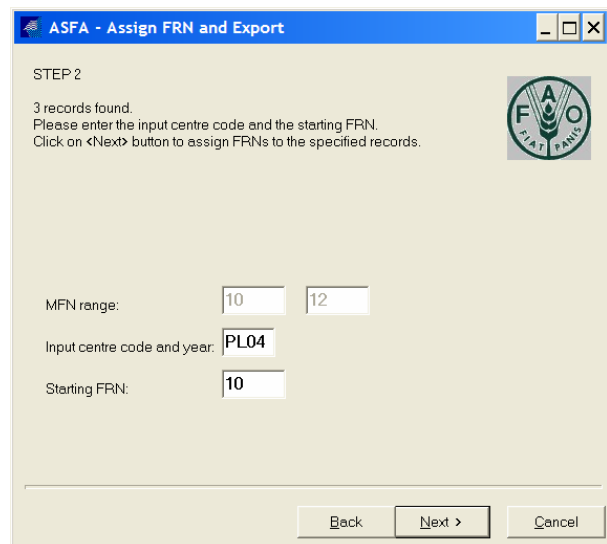
STEP 2 (success):

In the specified range the records are completed, therefore you receive this screen to continue. Here you define

(a) Input Center Code (only the first time, with the next run of the program the field will be filled) and year (2 digits).

(c) Starting FRN.

Note: if you provide FRN that already has been assigned to other records in the ASFA database, the system will issue an error message. In this case change FRN to the value that has never been assigned yet.



ASFA - Assign FRN and Export

STEP 2

3 records found.
Please enter the input centre code and the starting FRN.
Click on <Next> button to assign FRNs to the specified records.

MFN range: 10 12

Input centre code and year: PL04

Starting FRN: 10

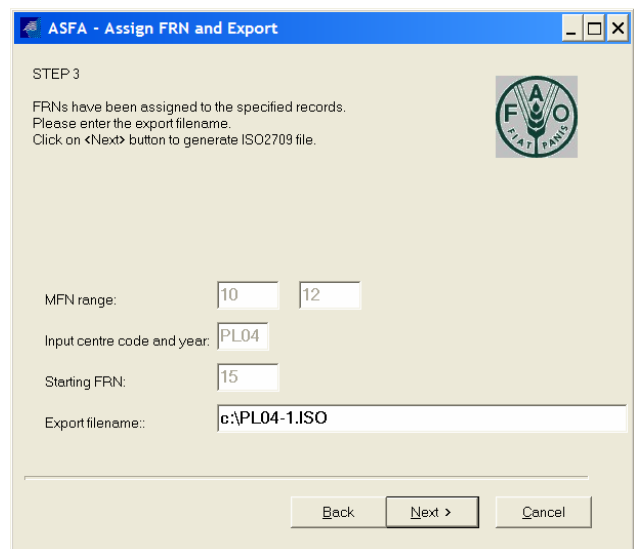
Back Next > Cancel

STEP 3:

For the specified range enter the name of the ISO2709 result file which you will export to CSA.

Assign a name to the file, which may include the Input Centre Code + Year + Number of Batch, such as **PL02-1.ISO**, **PL02-2.ISO**, etc. When you run the program next time your name will become a default value for the file name and location, so just adjust Year and Batch Number.

Press Next and complete the procedure with the FINISH button.



ASFA - Assign FRN and Export

STEP 3

FRNs have been assigned to the specified records.
Please enter the export filename.
Click on <Next> button to generate ISO2709 file.

MFN range: 10 12

Input centre code and year: PL04

Starting FRN: 15

Export filename: c:\PL04-1.ISO

Back Next > Cancel

Once the procedure is completed, you may send them to the Publisher CSA either by copying the file to a diskette and mailing it, or by transferring the ISO file via FTP or sending the file via e-mail, as a zipped attachment.

Once the procedure is completed, you may send them to the Publisher CSA either copying the file to a diskette and mailing it, or by transferring the ISO file via FTP or sending the file via e-mail, as a zipped attachment.

Advantages of using the new program

1. All the exported records have the status C (completed), as it is impossible to export uncompleted records.
2. After the first run the program remembers the setup for the Input Center Code
3. After the first run the program remembers the last exported MFN and next time it starts from the next MFN to be exported
4. The program automatically sets the upper limit to the last MFN
5. After the first run the program remembers the last assigned FRN and next time it starts from the next FRN to be assigned
6. All the exported records have assigned FRNs
7. After the first run the program remembers the name and location of the file exported to CSA,

so that it is easy to assign a new name according to the user convention

Note: The Field Separator and Record Separator that are set by the program are hexadecimal 1D and 1E (FS and RS in the code table). The same values are now setup by default in the DOS export and import worksheet.

Recommendation:

It is strongly recommended that the old in DOS ISIS export procedure is not used anymore. The ICIE team was considering removing the EXPORT/IMPORT options from the ISIS installation. However it may happen that for some non-standard cases the options might be necessary (especially import), therefore they are not removed from ISIS.

Implications:

- 1 CSA should be aware about the field and record separators;
- 2 It is now better situation for the partners as the problems reported before with importing records having tilde (~) as the first character in the field will not happen anymore.

3.3 Other new features of the upgraded software

With the new software the access to the lookup tables from the data entry worksheet has been upgraded in such a way that it is now possible to start a lookup list from the point indicated by the value of the field on the worksheet. So if before going to the list of corporate authors one enters the string FAO the to field, then press BROWSE button he/she will receive the lookup table starting from the term FAO, Rome (Italy).

This feature may change the customs of using the lookup tables. It should become a popular hint among the ASFA inputters and encourage them in using the lookup lists, which may result in improving the efficiency of the data entry process.

4. Special characters

Quotations

A special Java script has been prepared in order to solve the problems with special characters that users enter to the ASFA records. The main problem was with the combination of quotation signs with the triangular brackets, therefore the quotation signs are now replaced by the script to the mnemonic names as applied in Unicode. The script performs the replacement before submitting the page to the server. So in the ISIS record the characters appear in the form of mnemonic names. The characters and their names are given below:

"	'	,	‘	’	“	”	”
"	&rsquot;	&rsquot;	&lsquot;	&sbquot;	&ldquot;	&rdquot;	„

Whenever the record is red back to the worksheet page, or displayed for proof-reading, the browser replaces it to the form friendly to the user.

Implications to CSA

In the exported ASFA records now the mnemonic Unicode names may appear instead of quotations signs.

Implications to the ASFA partners

1. Now it is possible to mix in one field the quotations with triangular brackets, if for example one needs to enter text in italics e.g. <i> text </i> and use quotations.
2. It is not needed to use < or > for the *less than/greater than*.

There may still be problems with the records created under WWW-ISIS-ASFA containing a combination of quotations and < ...>. As before, those records can remain as they are until there is a need to update them under WWW-ISIS-ASFA. In such a case they should be first corrected under DOS ISIS, then can be taken to WWW-ISIS-ASFA for update.

Legacy records with @i convention

The new isis3w.exe program does not fail when the modified record contains @ signs. In addition, the data entry java script implements the translation from the legacy records containing @x ...@@ combinations to the current HTML based style (<x> ... </x>, where x may be i for italic or b for bold). So in the case when an old record is taken by WWW-ISIS-ASFA for update, while saving the system will automatically replace the @ strings.

Other special characters

Due to the change of FS and RS while exporting and importing ASFA records it is now possible to use safely the old convention for special characters, starting with tilde (~).

It is recommended however that the UNICODE style is accepted for entering in ASFA records. The WWW-ISIS-ASFA software will accept UNICODE mnemonic names, like e.g. α for α or β for β.

Restrictions

It is not possible to use the other UNICODE convention where the character code is used:

&#nnn;

This restriction results from the fact that # cannot be used as data element in WWW-ISIS.

Note: If the convention with mnemonic Unicode names is accepted by CSA, the existing java script has to be upgraded so that all accepted symbols are recognized in the ASFA data entry page and replaced by the corresponding mnemonic names before saving.

Advantages of using mnemonic names

The main advantage is that that the partners have the proper view of what is in the record. Additionally some of the special characters can be pasted to the ASFA form from other documents (e.g. PDF).

Problems

The extended set of special characters has to be accepted by CSA, as they will be coded with mnemonic names in the exported records.

5. Upgrade of the formats, worksheets and authority lists, user interface

Validation formats

The lists A and C of tasks in most cases covered requests for upgrading the ASFA formats, (validation and display), authority lists, and correcting the worksheets. All the requested corrections have been implemented. The main problems with the validation formats have been fixed. The new validation formats are easier for maintenance as well as provide much better control of the quality of data. In particular the control of duplicates in the descriptor fields, and checking for the rules of indexing with Primary and Secondary Classification codes will improve the quality of data.

Implications for the ASFA Partners

In some cases the system may slow down the data entry process, especially by providing more detailed control of data. On the other hand however the upgrade requirements for the validation formats has resulted from the observations of the most popular errors and mistakes performed by the ASFA inputers, one can therefore expect essential upgrade of the overall quality of data.

User interface

Within the tasks in TOR there were requests for upgrading the user interface. Of the requests of this kind the only that could have not been implemented in 100% was the request of the Link to Selection List. As tested by ICIE it is not possible to upgrade the software so that after copying a record one can create the RETURN link. Therefore, instead of the RETURN link another link has been implemented. It is the link to the BROWSE list starting with the given record (by title).

6. Annex 1

Table A1 Check list of performed tasks

Task	Remarks
1) Field "Translated by inputter (121)": in the AS worksheet Y should be changed to T in the Entry definition file.	Done
2) Information in the Local fields (tags 801, 803, 805, 807, 809) should not be exported to CSA when using export format CSA.fst. (<i>testing the newest cgi-bin with existing ASFA layout</i>)	Done
3) URL address (920). When making a copy, URLs are not copied into worksheet; (http appears twice in the display format; display format should be made insensitive to that kind of error: <u>and validation should be made</u> to check for http, ftp, https in the URL address.	Done
4) Provide work.par file in order to make possible cleaning of the work database	Done
5) Range of MFNs "in the www-ISIS-ASFA database using the EDIT Record 'by search' function" appear in Red:	Done
6) Update of the Corporate Author pick-list (to be imported in the software) and re-organize the alphabetical order.	Done
7) Update the MONLIS database	Done
8) Incorporate a warning message when the Environmental Regime Field is missing data	Done 5
9) Prepare Java script to control all conflicting characters in data entry.	Done
10) In all the worksheets, in the "Corporate author fields (110 ^a) and (210 ^a)" the ^a SHOULD be removed since the subfields no longer exist.	Done
11) In all the worksheets: - "Corporate author fields (110 ^a) and (210 ^a)" the ^a SHOULD be removed; - Author's Address field, the subfield Institute (509^a) the field length should be increased; - 'Imprint subfields' should be displayed as a group, with a centralized heading IMPRINT	Done
12) Add possibility to search for "Keywords from Full Serial Title" to the ASFA Search Interface and to the Edit Record(s) by search option of the ASFA Data Entry Interface	Done
13) Amend the CONTR format : a. For M and MS worksheets: the phrase " Refer for correspondence " is erroneously replaced by ^cY b. For AS/AM/AMS/C worksheets: in the phrase "Refer for correspondence" the word correspondence should have two rr. c. For AS worksheet: the word "comp." for Compiler does NOT show. d. The semicolon; which separates more than one "report document number" does not show therefore it is difficult to distinguish the individual numbers (i.e. where one starts and the other ends). e. The Non-English abstract field is repeatable and therefore when there is more than one occurrence, they should be separated i.e. the second Non-English abstract should start on a new line. f. For the M/MS/AM/AMS worksheets (AM and AMS only at the monographic level), the ^a which appears in front of each author should be removed	Done
14) Amend the Verification display format (and all the other display formats) : a. The phrase "Translated by indexer" should read "Translated by inputter " for the lines which refer to v221 b. Change Journal Allocation to Primary Journal Allocation , in the line which refers to d998^a c. Change Subject Category to Primary Subject Category , in the line which refers to d998^b.....	Done
15) If a new record is input and saved by "copy" mode there is no hyperlink to "Selection list". Note: ICIE will investigate the possibilities to upgrade WWW-ISIS-ASFA in this respect, and, if possible, will implement the feature	Partially done (by the link to BROWSE)

16) In the Edit Records by Browse display: a. Add a 'Delete' button to the Record Options Bar b. Replace PgDn by "Next page" c. Add the "Next Page" button at the bottom of page d. Make the links "Bottom" and "Top" (on top and bottom of the page respectively), to make easier navigation to go to the bottom (top) of the page e. After having selected "View", have the button Selection List included in the Options Bar at the top, and also repeat the Options Bar at the bottom of the page	Done
17) In the TOP of the Data Entry Interface change the Download button to read 'Download/Print' (still to be decided in view of the inclusion of the new TRN/export utility described in point 1 of "E. Additional improvements to software"	Done
18) TOP and Bottom links for data entry screens (worksheets)	Done
Prepare upgrade package + instruction.....	Done
19) Prepare a TRN/export utility to operate like a standard "wizard". Continu	Done
20) Addition of verification checking procedures provided to by FAO (E-mail L. Lombardi to you dated 27 September 2004.	Done
21) 3. Addition of verification/checking procedures regarding fields 998 and 999 provided to you by FAO in the E-mail from H.Wibley to you dated 27 May 2004.	Done
22) 4. Addition of a Verification/checking procedure for input of duplicated descriptors. Field for descriptors input doesn't show all the descriptors selected so indexers very often inputting the same descriptor twice and rarely three times."	Done
23) 5. In the ASFA worksheets, increase the number of rows to four in the following fields: English title (120); Non-English title (124); English monographic title (220); Non-English monographic title (224). Also, increase the number of rows to two in the Subject descriptors field (960).	Done
24) 6. Provide support to Partners who have trouble loading Version 1.1 up to 5 weeks after its release (i.e. 31 December 2004).	TO be done