



NEW I-SHARE LIBRARIES PROJECT ORIENTATION WEBINAR

August 9, 2017

Today's Agenda

- Welcome and introductions
- Brief overview of CARLI and I-Share
- Project components
- Project timeline and deadlines
- Next steps



Introductions



Anne Craig
CARLI Senior Director



Kristine Hammerstrand
Director, User Services



Jen Masciadrelli
Senior Project Management Coordinator
CARLI Project Leader for New I-Share Libraries



Welcome I-Share “Class of 2018”

4 New I-Share Members in 2017/2018:

- Abraham Lincoln Presidential Library, Springfield (ALP)
- McHenry County College, Crystal Lake (MHC)
- Moody Bible Institute, Chicago (MBI)
- Spertus Institute of Jewish Studies, Chicago (SCJ)



CARLI and I-Share

CARLI

- Consortium of Academic and Research Libraries in Illinois
- Currently serves 134 Illinois academic/research libraries
- Wide array of library services including I-Share

I-Share

- Integrated library system, union catalog and resource sharing tool
- Software is Ex Libris Voyager, version 9.1.1
- Currently used by 86 CARLI libraries
- Class of 2018 will bring us to 90 I-Share libraries



CARLI Office and Staff

As of July 2017: 25 staff, including:

- Anne Craig, Senior Director
- Librarians
- Programmers, data specialists, and networking staff
- Communications manager and Website manager
- Financial officer and assistants

Most CARLI staff are based in Champaign, IL

CARLI is part of the University of Illinois, but separate from the UI libraries

Directory: <https://www.carli.illinois.edu/about/office>



CARLI Staff Responsibilities

CARLI staff provide technical and user support for I-Share and other CARLI services

- Manage computer servers, applications, security
- Provide training and ongoing “help desk” service
- Prepare I-Share-specific system documentation
- Maintain website and email distribution lists
- Coordinate CARLI committees and meetings
- Manage contracts and payments to vendors
- Manage ILDS



Ex Libris, a ProQuest Company

Develops and sells Voyager and other products

I-Share library staff rarely work directly with Ex Libris staff, except:

- Ex Libris data analysts work with your library staff and CARLI staff on your initial data migration
- Ex Libris authors Voyager user manuals

Ex Libris' website: <http://www.exlibrisgroup.com/>



Ex Libris Staff Assigned to this Project

Data Services Manager and Data Analyst

– Adriana Pilecky-Dekajlo

Data Migration Technician

– David Sellers

CARLI staff will serve as liaisons between library staff and the Ex Libris staff



I-Share's (Voyager) Functions

Public online catalog with 2 web interfaces:

VuFind and WebVoyage Classic

Acquisitions and serials management

Cataloging

Circulation and course reserves

Universal Catalog (aka, union catalog; aka I-Share)

Universal Borrowing: I-Share resource sharing and reciprocal borrowing



I-Share's Local and Union Catalogs

Each I-Share library has its own separate Voyager database

Search your library (only) or any one I-Share library

- For example: EIU <https://vufind.carli.illinois.edu/vf-eiu>

CARLI also has a I-Share Union Catalog (aka “the UC”)

<https://vufind.carli.illinois.edu/all/vf/>

- De-duplicated bibliographic records
- Current item status info from each library’s database
- Place requests for items owned by any I-Share library
- Also serves as a source for bibliographic catalog records



Project Milestones

October 13, 2017

- Provide a copy of all of your bib and item records for test load

November 13, 2017

- Provide a copy of all of your patron records for test load

December 3, 2017

- Provide a copy of all of your current circ status data for test load

Alternately, provide all test data at once, by October 13, 2017

January 12, 2018

- Provide a copy of all of your bib and item records for final load

February 7, 2018

- Provide a copy of all of your patron records for final load

February 27, 2018

- Provide a copy of circ status data for final load

March 8, 2018

- Live on Voyager for your own OPAC, cataloging, and circulation

Late March 2018

- Live in union catalog for I-Share Resource sharing



Computers, Data, and People

Three areas of activity in this project:

- Computers
 - Creating each new library's Voyager database on CARLI's servers
 - Installing Voyager client software on your library's staff PC's
- Data
 - Copying ("extracting") data from your current library system
 - Translating ("mapping") your data into Voyager formats and values
 - Loading ("migrating") your data onto CARLI's servers
- People
 - Training library staff to use Voyager
 - Helping you make your implementation decisions



Computers: CARLI Headquarters

CARLI and Ex Libris will create for each library:

- A secure FTP directory to and from which you may transfer data files
- A Voyager test database
 - Where CARLI and Ex Libris will load your data for testing and your review
 - Test data is not in the public view
 - Each I-Share library has a separate test database
- Eventually, a live "production" database



Computers: Your Libraries'

On public catalog PCs: A Unicode-compliant web browser

On library staff-use PC's: Voyager Windows staff clients

- Circulation/Reserves
- Cataloging
- Acquisitions/Serials
- Reporting
 - Voyager Reporter Client (printing notices, purchase orders, etc.)
 - ODBC and Access for some (actual reporting against Voyager data)
 - Secure FTP client (SFTP) for sending data to and from CARLI



Data Migration Overview

You, your current vendor, or a consultant, makes a copy of the data in your current system, including: MARC bibliographic records, holdings/items, circulation status, and patron records;

The data is sent to CARLI via SFTP;

Ex Libris formats data and loads it on the CARLI test server

You review the test load, note/resolve any issues, and ultimately approve the test;

Meanwhile your current system operates as usual;

After test loads are completed, a second copy is made of your data, and loaded into production I-Share!



Which Data are Migrated?

Libraries will migrate these types of data:

- Bibliographic (MARC) records, MARC holdings (if present), and item records
- Patron records
- Circulation transactions (currently charged/renewed materials)
- Authority records–yours, or our copy of the full set of LC authorities

We are not going to migrate:

- Current fines/fees owed and paid
- Recalls
- Vendor records
- Purchase orders
- Serial pattern records



Data Migration is Incremental

We have to follow a specific order

- First the bibs, holdings, items (and authorities)
- Next the patron (name, address) records
- The circulation transactions come last as they reference both item and patron records

After each load CARLI will review for quantity (record count) and YOU will review for accuracy

You have a firm deadline to approve or reject the test loads (2-5 days, depending on the type of load)

You will want to identify, in advance, a set of records you will check for accuracy



Data Migration Responsibilities

New I-Share Library Staff Will:

- Identify a library staff member to serve as your project manager. They will serve as CARLI's primary contact during the project and will "sign off" on your data migration reviews;
- Complete a Data Migration Questionnaire, aka "DMQ" (Tells us how the data you send us will be formatted);
- Prepare an "ABBA" table (An Excel sheet of your current locations and item types and the location and item types you will use for each in Voyager);
- FTP copies of your current data to CARLI for test and final loads;
- Enter your library's policy settings into Voyager's "SysAdmin";
- Review your test data;
- Send staff to CARLI's training sessions and provide training for additional staff who do not attend;
- Install Voyager clients on your staff PC's;
- Ask questions whenever you need help or a clarification; and
- Stay aware of and meet all project deadlines!



Data Migration Responsibilities

Ex Libris staff will:

- Consult with your library and CARLI about your data;
- Format the data you send to Voyager's requirements;
- Load the data in Voyager (test and production);
- Perform some quantity and quality checks;
e.g., Check that number of records loaded matches the number in the input files
- Make adjustments to correct any data mapping errors identified in the test loads; and
- Expect us to meet the established project deadlines!



Data Migration Responsibilities

CARLI staff will:

- Serve as liaisons between libraries and Ex Libris staff;
- Provide documentation on I-Share-specific matters;
- Present a data migration webinar (9/7/17) and participate in each data migration conference call (week of 9/25/17);
- Review the data for every load per library;
 - CARLI staff review will focus on CARLI's requirements;
- Provide training and answer questions;
- Offer advice based on our experience; and
- Remind you about approaching project deadlines!



Data Migration Webinar and Conference Calls

- Data Migration Planning Webinar Scheduled for September 7
Followed by a phone call to discuss your Data Migration Questionnaire (DMQ):
- Each library will have its own call in September.
- Participants will include:
 - CARLI staff
 - Ex Libris data analyst
 - Your library's project leader
 - Your library staff that know your data the best (e.g., person(s) in charge of cataloging and/or your current system)



When Can You Begin Using I-Share for Real Work?

If the library staff are ready (training done), the library may begin to use Voyager “for real” following the last production load of each type:

- Voyager cataloging may start after the production bib load
- Circulation work may start after the production circ load
- Acquisitions/Serials work may start after the bib load, if desired (some libraries implement Voyager Acq/Ser later, and some do not use it at all)

This means you could start to use Voyager in phases by function, and stop using your current system on the same phased schedule



When Must You Begin Using I-Share for Real Work?

Once you have made the copy of your data that will be used for your production loads, you should no longer make changes in your current system!

Between the date on which the copy is made, and when you accept your production load, is the period we call the “gap”

- Suspend the activity entirely, temporarily, OR
- Use alternate tools, e.g., OCLC for cataloging, Voyager offline circulation

Changes made in your current system after the gap begins will NOT be transferred to Voyager (unless you manually re-enter them in Voyager)



Planning to Stop Using Your Current System

- Notify your current vendor of your intent to stop using their product, meeting any contractual notification dates;
- Think about any final reports you may want to run on the current system (e.g., any data you are not migrating such as fines, etc.)
- Contract with current vendor or other party to do data extracts and any final reports (if needed)
- If you are in a shared (consortial) system now:
 - Consider the date to stop all reciprocal borrowing in current system
 - Plan to have all your data (bibs, patrons, logins, etc.) removed from that system once you are live on Voyager
- Contact the office(s) that provide you with patron data (e.g., campus IT/admissions/payroll offices, etc.), inform them of specs for Voyager patron data (for ongoing updates after migration)
- Make sure all webpage links to your current system get redirected to your new I-Share URL after “go live”



Identifying Data for Test and Production Load Reviews

Library must identify example records for verifying the test and production loads

CARLI has worksheets to help with this task:

http://www.carli.illinois.edu/sites/files/ishare/documentation/migr_worksheets.pdf

Allow sufficient time -- finding representative examples can take as long as doing the actual data reviews

For the bib load, these records don't usually change much over time, so the examples you use for test load review should remain applicable for the production load review

For the patron and circ loads, these data can change quickly; you will probably need to update your examples between the test and production load reviews



Pre-Data Migration Bib/Item Data Cleanup

Try to identify every shelving location code, item type, and patron type present in your current system, even if you no longer assign these codes to new items. Any codes you don't include in your mapping tables will be assigned Error or Default values in the test load. You can fix these between the test and production load, but it's better to do this work early when you have more time.

As time allows, consider doing data cleanup projects *before* your production extracts, for example:

- Merging or deleting duplicate bib records
- Deleting any “On-the-fly” (temporary) records you don't want to migrate



Pre-Data Migration Patron Data Cleanup

As time allows, consider doing data cleanup projects *before* your production extracts, for example:

- Purging expired patron records -- highly recommended!
- Updating patron records missing any fields required for conversion
 - Institution ID
 - Patron group/type
 - Last and First names (for “personal” name types)
 - Address line 1
- Eliminating duplicate patron records



I-Share's Resource Sharing Components

- Union Catalog
- De-duplicated bib records of all I-Share libraries
 - Source for locating items to borrow from other I-Share libraries
 - (Optional) Source for locating cataloging records for your new items already cataloged by other I-Share libraries
- Universal Borrowing
 - Allows authorized I-Share library patrons to borrow materials from any I-Share library, either onsite at the owning library, or via remote request and ILDS delivery



Implementing Universal Borrowing

- Your library defines its own policies for circulating its circulating collection to your patrons, but you will use I-Share standard policies when loaning your circulating items to other I-Share libraries' patrons.
- After all new I-Share libraries are live on Voyager for local circulation functionality, the new libraries' databases must undergo "Universal Borrowing (UB) Integration" – CARLI staff do this work with the libraries' input
- UB integration allows I-Share libraries' various patron groups and item types to use consortium-wide standard loan policies for UB transactions.
- March 2018, exact date TBA, but soon after all libraries are live on Voyager for circulation



Adding New Libraries to the I-Share Union Catalog

- After all new I-Share libraries are live on Voyager for local functionality, their bib and holdings data will be copied from their own Voyager databases and added to the I-Share Union Catalog
 - If your bib records match (usually by OCLC number) existing records in the UC, your holding will be attached to the existing record in the UC (The record also remains in your own Voyager database)
 - If your bib record does not match an existing record in the UC, it will be added to the UC (The record also remains in your own Voyager database)
 - CARLI staff perform this task
 - March 2018, exact date TBA, but after UB integration is complete



Universal Borrowing Policies

CARLI has consortial loan policies that apply to all UB loans (remote requests and onsite reciprocal borrowing) of items in your circulating collection

CARLI UB policy chart is located at

<https://www.carli.illinois.edu/products-services/i-share/circ/UBStandardChart>

Are your local policies less generous than CARLI's? E.g., do you loan your circulating books to your own patrons for less than 28 days? If so, consider changing your policy before or when you go live on Voyager, so that you don't give other I-Share library patrons more generous loan periods than you give your own.



People

- The most important component of the project!
- Let's talk about
 - Training staff to use Voyager
 - Communicating with the CARLI and Ex Libris staff
 - Documentation and project resources
 - Participating in CARLI activities



Training

- CARLI will provide hands-on training in each functional area of Voyager (circulation, cataloging, etc.)
- Training sessions will be at the CARLI Office in Champaign
- CARLI will train 2 or more staff (as space permits) from each library in each Voyager component
 - For libraries with few staff, this may cover all their Voyager training needs
 - For libraries with more staff, staff who attend training sessions will be expected to train colleagues, student workers, etc.
- Proposed training dates on next slide, and on project timeline spreadsheet



Training Sessions

- Separate sessions will be offered as follows:
 - Project Orientation webinar – Today
 - Site Visits – Scheduled for the end of Aug./Beginning of Sept.
 - Data Conversion Orientation webinar – Sept. 7, 2017
 - Data Migration conference calls with each library – Week of Sept. 25
 - MFHD Basics workshop – Oct. 5, 2017
 - Data Review training – Nov. 2, 2017
 - System Administration profiling workshop – Week of Nov. 13
 - Cataloging client training – Dec. 7-8, 2017
 - Circulation client training – Feb. 8, 2018 (snow date Feb. 15)
 - OPAC staff use and Universal Borrowing training – Feb. 9, 2018 (snow date (Feb. 16)
 - Acquisitions/Serials training – March 2018 TBD
 - Introduction to using Microsoft Access to create Voyager reports – March 2018 TBD



Introduction to MFHDs

- MARC Format for Holdings Data
 - Standard format for storing library holdings information, such as locations, call numbers, summary holdings, etc.
- Covers MFHD record structure
- 1 day session
- Lecture/demo format with individual written exercises (no hands-on)
- Taught by CARLI staff



Data Review Training

- Topics include:
 - Voyager client installation
 - Basics of using the Voyager Cataloging and Circulation clients to review your data test loads
- 1 day session
- Lecture/demo format with hands-on exercises
- Taught by CARLI staff



System Administration Workshop

- System Administration is Ex Libris' name for the policy, profile, and security settings component of Voyager
- Topics include:
 - Profiling and options for Circulation, UB, Cataloging, Acquisitions, and OPAC settings
- 1 day session
- Lecture/demo format (no hands-on)
- Taught by multiple CARLI staff members



Cataloging Client Training

- Topics include:
 - Adding, editing, deleting bibliographic, MFHD, and item records;
 - Importing bib records from OCLC or I-Share Union Catalog
 - Cataloging best practices for our union catalog environment
- 2 consecutive days
 - Participants must attend both days
- Hands-on training
- Taught by CARLI staff



Circulation Client Training

- Topics include:
 - Charging and discharging items
 - Patron records
 - Reserves
- 1 day session
- Hands-on training
- Taught by CARLI staff



OPAC and Universal Borrowing Training

- Topics include:
 - Searching the online catalog (WebVoyage and VuFind)
 - Patron-initiated requests, “My Account”
 - Processing Universal Borrowing (UB) requests
- 1 day session
- Taught by CARLI staff



Acquisitions/Serials Client Training (optional)

- Topics include:
 - Funds and Ledgers
 - Adding purchase orders and line items
 - Invoicing
 - Serials control
- 2 consecutive days
 - Participants must attend both days
- Hands-on training
- Taught by CARLI staff
 - *Note: Using Voyager Acquisitions/Serials is optional*



Introduction to using Microsoft Access to Create Voyager Reports

- Topics include:
 - Using CARLI's new Web Reports
 - Using pre-made queries
 - Creating and modifying queries
 - Importing queries from other sources
- 1 day session
- Taught by CARLI staff



Communication During the Project

- Most project communication will be by e-mail
- All project materials and documentation for libraries will be available on the CARLI website
- Your library must designate one person as “project manager” who will have the “final word” on your library’s implementation decisions
- Most communication will be between CARLI staff and new library staff; Ex Libris will “chime in” as needed



Communication Tools

- With the exception of during the data review process, new libraries should direct questions first to CARLI staff:
 - support@carli.illinois.edu
 - An automatic question tracking number is assigned to each new question
- CARLI staff will send information pertinent to all new libraries to a New I-Share libraries email distribution list:
 - newlibs2018@carli.illinois.edu
 - Anyone who receives email sent to this list can also post to the list; Replying will automatically send the reply to everyone on the list
 - To add other staff to the New Libraries list, send a request to support@carli.illinois.edu



Other CARLI Communication Tools

- CARLI has a general broadcast email list
 - announce@carli.illinois.edu
 - You may receive; only CARLI staff may post
 - Includes a monthly CARLI e-newsletter
- CARLI has many topical email lists
 - Many of them allow all subscribers to post
 - See: <http://www.carli.illinois.edu/email-lists.html>
- CARLI holds various open meetings and/or webinars
 - You are welcome to attend; good opportunity to network
- CARLI has a lot of committees, you are encouraged to volunteer
 - See: <http://www.carli.illinois.edu/comms.html>
- Communicate with your peer libraries already using I-Share
 - Site visits can be very helpful to see workflows and the big picture



Ex Libris' Communication Tools

- Ex Libris' Voyager documentation (Users' Guides)
 - Available for download from I-Share New Libraries web page
 - <http://www.carli.illinois.edu/products-services/i-share/newmem>
 - Libraries wanting print copies may print their own
- Ex Libris Knowledge Center
 - <http://knowledge.exlibrisgroup.com/>
- ELUNA, the North American Ex Libris User Group web page
 - <http://el-una.org>
 - Voyager-L, the world-wide Voyager customer email list; subscription information available from ELUNA website



Reviewing the Project Milestones

October 13, 2017

- Provide a copy of all of your bib and item records for test load

November 13, 2017

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December 3, 2017

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Alternately, provide all test data at once, by October 13, 2017

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- Provide a copy of all of your patron records for final load

February 27, 2018

- Provide a copy of circ status data for final load

March 8, 2018

- Live on Voyager for your own OPAC, cataloging, and circulation

Late March 2018

- Live in union catalog for I-Share Resource sharing



Implementation Timeline

The complete project timeline is posted on the CARLI website

- Let's look at the current timeline now....
- We have very little schedule flexibility once the project starts, as we are working on contracted time with Ex Libris
- <https://www.carli.illinois.edu/sites/files/i-share/documentation/2018newisharetimeline.pdf>



Timeline				
Deadlines and Trainings	Whose Task	Task Description	Start Date	Finish Date
	Libraries	Production bib load reviews	1/29/18	2/2/18
Deadline!	Libraries	Libraries production bib load acceptance due.		2/5/18
	CARLI	CARLI Staff does Cataloging and Security SysAdmin work based on settings discussed at Profiling Meetings). <i>Once complete Libraries are Live on Voyager for cataloging. Cataloging gap ends.</i>		2/5/18
	CARLI	CARLI staff add libraries to daily OCLC load scripts		2/5/18
	CARLI	CARLI staff add custom indexes to DBs and perform regens (overnight)		2/6/18
	CARLI	CARLI staff update UB lookup tables in all DBs		2/6/18
Deadline!	Libraries	Extracts of PRODUCTION patron records due. Sites quit updating patron records in current systems. Patron record gap begins.		2/7/18
Deadline!	Libraries	Libraries final patron group code mappings due		2/7/18
Deadline!	Libraries	Deadline for completing UB patron mapping worksheets		2/7/18
Deadline!	Libraries	Deadline for decision on supporting local call slip processing		2/7/18
Training	CARLI, Libraries	Circulation Client Training		
Training	CARLI, Libraries	Searching and Requesting via VuFind and UB Training		
Training	CARLI, Libraries	Circ/Searching/UB training snow date		
	Ex Libris	Processing of production patron records by ExL Professional Services	2/8/18	2/15/18
	Ex Libris	Production patron loads	2/16/18	2/16/18
FYI		President's Day	2/19/18	2/19/18
	Libraries	Production patron reviews	2/20/18	2/21/18
Deadline!	Libraries	Production patron load acceptance due		2/22/18
	CARLI	CARLI staff add libraries to routine daily cataloging batch processing		2/22/18
	CARLI	CARLI staff establish production OPAC interfaces for all libs		2/22/18
	CARLI	CARLI staff add UB patron types to SysAdmin		2/23/18
	CARLI	CARLI sets up and reviews Circ System Administration (based on settings discussed at Profiling Meetings) for production circ loads	2/23/18	2/26/18
	CARLI	CARLI completes UB patron group rules/matrices in SysAdmin	2/23/18	2/26/18
Deadline!	Libraries	Extracts of PRODUCTION circ data due to ExL. Circulation gap begins		2/27/18
	Ex Libris	Processing of production circ data by ExL Professional Services	2/28/18	3/1/18
	Ex Libris	Production circ loads	3/2/18	3/5/18
	Libraries	Production circ review	3/6/18	3/7/18
Deadline!	Libraries	Production circ load acceptance due. LIVE ON VOYAGER FOR LOCAL OPERATIONS		3/8/18

Recap: Key Materials and Resources

- I-Share new members web page:
<http://www.carli.illinois.edu/products-services/i-share/newmem>
 - Project Timeline
 - Voyager User's Guides
 - I-Share-specific documentation
 - Training information
 - DMQ and ABBA table information
 - Data review testing worksheets
- Your DMQ and ABBA table as submitted to Ex Libris (and any revisions)
- Email from CARLI staff (to you or all new libraries)
- Various Usernames and passwords and connection setup
 - Test server, training server, your SFTP (file transfer) directory
- Contacting CARLI: support@carli.illinois.edu
 - Toll free: 1-866-904-5843



Your Homework from Today's Meeting

- Decide who your project lead/contact will be
- Contact your current system vendor/consortium to give adequate notice
- Begin planning for your data extraction
 - First test data is due October 13, 2017
 - First production data is due January 12, 2018
- Start gathering the location, item, patron type information used in your current system
- Start gathering example records for data review
- Talk with other I-Share libraries, do site visits



Don't Panic!

- The CARLI staff know it's hard to make decisions about a system before you fully understand it.
- We will try to inform you which decisions you can change later, and which you cannot; and we will do our best to help you have a successful implementation.
- Voyager offers a myriad of options and features, including some you may not wish to use at first, or ever.
- Remember: 86 other libraries have successfully been through this process before you!
- Don't hesitate to contact CARLI with *any* questions
 - support@carli.illinois.edu
 - Toll free: 1-866-904-5843

