



DMQ Follow-up Questions - 2018 New I-Share Libraries

Introduction

This survey is the second of 2 surveys that CARLI will ask you to complete to assist with your library's bibliographic data migration.

Please complete this second survey by 9/22/17.

These questions follow up on the data you provided in the first survey, and rely heavily on reading and having some understanding of our [Voyager Data Conversion Information \(DCI\)](#) document.

Bolded letter/number combinations following the question numbers reference specific sections in the DCI.

We'll review your answers to these questions during the Data Migration Conference calls with Ex Libris in Late September.

You can refer to the DMQ (previous survey) and the DCI, or contact support@carli.illinois.edu with any questions.

1. Please enter the name of the person completing this survey.

2. Please enter the email address of the person completing this survey.

3. Please select the new I-Share Library you are affiliated with

Questions about migration of your bibliographic data.

* 4. **B4.** The standard Voyager bib load process uses the 949 field for the temporary storage of the holding data in the bib record. All 949 fields are deleted at the end of the bib load process. Any existing (prior to migration) 949 field data that must be retained after the load needs to be moved to another field in the bib records prior to the bib load processing.

Q: Does your library need to retain any current 949 data your their bibs?

Yes

No

If Yes, please elaborate on content of 949 field.

* 5. **B5.** The standard Voyager bib record conversion program will move the OCLC control number into the 035 \$a in Voyager bibs, if it is not already stored in the 035 \$a.

If your current system stores the OCLC number in a unique field/subfield (e.g., in DRA it was 010 \$o), this information must be shared with EXL so that the OCLC number can be mapped to 035 \$a in the Voyager bib records.

Q: Which field in your bibs contains the OCLC number?

6. **B5.** If your current system has numbers other than OCLC numbers in the OCLC number field (e.g., control numbers for “short” bib records), you must work with EXL to try to distinguish OCLC numbers from “other” numbers.

Q: Are there non-OCLC numbers in the same field as the OCLC numbers?

Yes

No

If Yes, elaborate on non-OCLC numbers in OCLC number field.

7. **B5.** How are your OCLC numbers formatted? Often, the OCLC numbers can be identified based on the prefixes “ocm” or “ocl7” or “(OCoLC).”

8. **B5.** If your current system stores both the OCLC number and your system control number in the 035 \$a, it is imperative that you work with EXL to distinguish OCLC numbers from the current system control numbers.

Ex Libris will map your current system's control number 035 \$9 during conversion, and map the OCLC number to 035 \$a.

Q: Which field contains your current system's unique identifying control number?

9. **B5.** No matter where your current system stores the OCLC number, it is important to try to remove data that do not represent the OCLC number from the 035 \$a in the converted Voyager bib records.

Q: Is it OK with the library to delete from all bibs any 035a data that does not represent an OCLC control number?

Yes

No

10. **B5.** In November 2006 OCLC began adding a \$z to their newly-supplied 035 field, when the bib record contains an 019 field, with the \$z data representing the deleted/merged OCLC control numbers. The CARLI Office believes this 035 \$z data does not provide any additional functionality over what is present with the 019 field, and recommends that 035 \$z data that duplicates 019 data be deleted from bibs within the local system prior to extract. EXL's standard conversion programs for normalizing OCLC numbers does not include normalizing the 019 or de-duplicating field 035 \$z. EXL's programs can delete any 035 \$z data present in the bibs (without trying to de-duplicate it based on the 019 field).

If the library has no particular need to retain any 035 \$z data in their converted bibs, it is recommended that all 035 \$z data be deleted from the bibs as part of the bib load.

Q: Is it OK with your library to delete from all bibs any 035z data present?

Yes

No

11. **B7. Bib record creation.** If the your current system contains item records that are not linked to any real bibliographic record (some systems call these "on-the-fly" or "uncataloged items"), Ex Libris will need to create both a bib record and a MFHD record for those items as part of the data conversion. Voyager requires a bib and MFHD record for all item records (even Voyager on-the-fly records).

Q: Does your library have any on-the-fly item records that will need to be converted to bib/MFHD records as part of the migration?

Yes

No

If Yes, can you provide details about these records?

12. Does your library have any bib records that are not already in MARC format?

Yes

No

If Yes, please provide further information about these records.



DMQ Follow-up Questions - 2018 New I-Share Libraries

Detailed Questions about your Data - Authority Data

13. **A2. Authority Records:** Does your library want to convert authority records from your current system, or should we load the I-Share-supplied LC authorities? Note: Most libraries choose to have I-Share supplied LC Authorities. If you have highly customized your authorities, let's talk.

- Please load full set of I-Share supplied LC authorities (partial set during test loads).
- We will provide our own Authority records.

14. **A4. Authority Records:** if you want I-Share supplied LC Authority records, do you want both Names (including Series titles) and Subjects, or just one of the files? (Note: most Libraries choose both Names and Subjects).

- Names (including Series titles) and Subjects
- Only Names (including Series)
- Only Subjects

15. **M1.** MFHDs will be created at the time of the conversion, as they are an integral part of the Voyager record structure. (EXL)

Q: Does your current system have existing MFHDs/serials copy records to convert?

Yes

No

16. **M2.** If you will be converting records to Voyager that represent “bound with” situations (i.e., a single item that is linked to multiple bibliographic records), your library must explicitly notify EXL of this situation. Special processing is required for the proper linking of “bound withs” during the conversion. (EXL)

Q: Does your library have any bound-withs or analytics in your current system?

Yes

No

17. **M5.** CARLI recommends that each library have Ex Libris globally copy all 856 fields found in a bib record to the MFHD linked to that bib record.

Q: By checking below your library acknowledges that 856 fields will be copied from bib records to MFHDs as described in M5 of the DCI document.

I acknowledge the 856 data will be copied.

18. **M6.** Ex Libris needs to know which classification system your library uses for call numbers.

Note that if your library uses more than one call number classification scheme, you'll also be submitting an Excel file to assist Ex Libris during the conversion process. The details are on page 15 of the DCI.

Q: What call number schemes does your library use (check all that apply)?

- LC
- Dewey
- Other
- If you answered "Other" Above please describe the scheme.

19. **M6.** Ex Libris needs to know whether your library uses call number prefixes or suffixes (e.g., REF, Doc, etc) so that they can be correctly parsed into the 852 \$k and 852 \$m, respectively.

If you use prefixes or suffixes you will need to create an Excel file of the exact text (including case and punctuation) of the prefixes and/or suffixes, for call number parsing during conversion.

Q: Does the library use call number prefixes or suffixes (check all that apply)?

- Prefixes
- Suffixes
- No prefixes or suffixes

20. **M6.** Does the call number field in item records contain copy numbers or text that is considered to be enumeration data, such as VOL. or PT.?

If so, you will need to create an Excel file of the exact text (including case and punctuation) in column A and the definition (copy or enumeration) in column B to help Ex Libris parse your copy number and/or enumeration data from the call number field to the applicable item record fields.

Does your call number field contain such data?

- Yes
- No

21. **M8.** The standard Voyager conversion program will create separate MFHDs whenever the converted item records contain different copy numbers, even when the location and call number are the same. The conversion program will need to add an 852 \$t for all MFHDs created in conversion, and the value in 852 \$t will be populated from the item record's copy number. If a converted item record does not have any copy number data at all, the 852 \$t added will default to the value of "1" (and not "Copy 1").

Does your library have any reason to not use this recommended default?

Yes

No

If Yes, please describe why you do not want the recommended default of '1' for your copy number.

DMQ Follow-up Questions - 2018 New I-Share Libraries

Detailed Questions about your Data - Item Data

22. **12.** Voyager does not support the functionality to create customized item statuses. If you have items statuses in your current system that you would like to migrate, you will map them to one of the item statuses in the chart below.

Note: If you will migrate item statuses, you'll submit an Excel File to assist Ex Libris during the conversion. These details are on page 20 of the DCI.

Voyager Item Status Code	Meaning
BIND	At bindery
CAT	Cataloging Review
CIRC	Circulation Review
CLMR	Claims Returned
DAMA	Item Damaged
LOSS	Item lost - system applied
LOST	Item lost - library applied
MISS	Item missing
WITH	Item withdrawn

Q: Does your library have item status codes that need to be converted?

Yes

No

23. **I5.** If an individual item record does not contain data in the copy number field, a default copy number of 1 (one) can be supplied during the conversion. If no default is requested, the converted Voyager item record will contain a value of 0 (zero) in the copy number field.

CARLI recommends that libraries have the default copy number set to 1 (one), due to public catalog displays.

- Yes, provide default copy 1. (Recommended)
- No, leave default copy 0.

If requesting to leave default copy 0, please give reasoning below.

24. **M9.** If your library has item records in the current system that contain notes, these notes can be converted to either item record notes or MFHD notes in Voyager.

In Voyager, item record notes never display to the public, but can be viewed only from within the staff clients. MFHD notes can be designated as staff-only, or public (OPAC) display.

Q: Does your library have item record notes that need to be migrated?

- Yes
- No

25. **M9.** Should your item level notes be migrated to the item or the MFHD?

- Item (STAFF ONLY)
- MFHD STAFF ONLY
- MFHD PUBLIC (Shows in OPAC)
- No Item Notes