

I-Share Voyager Migration

Data Migration Acceptance Testing

Worksheets for New I-Share Participating Libraries

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Instructions

- Use these worksheets to collect good “test cases” for your library’s data migration to Voyager. These worksheets are for your benefit. Use them in whatever way makes most sense at your institution. They do not need to be returned to the CARLI Office. The time each library will have for data verification will be very brief. The more you prepare in advance, the better.
- This document suggests some “notable features” of which libraries might want to collect examples. Feel free to collect more than one example of each “feature.”
- Use the blank rows to note additional records you want to scrutinize, particularly if there are additional “notable features” not suggested in the table. Feel free to enlarge the table, or to make additional copies of it.
- If your library does not have a record with one of the suggested features—for instance, if you do not happen to have a bib record with more than 100 items attached to it, or a National Library of Medicine call number—don’t worry about it. Feel free to skip any entries in the worksheets that are not applicable to your data.
- Be aware of what record types your library has opted to migrate. For instance, most libraries will not actually convert their authority records; authority records will be loaded “fresh” from Library of Congress data files into Voyager. For these libraries, it will not be relevant to select sample authority records from the current local system to be used during the data conversion verification testing. Also, this document assumes that the only conversions the new I-Share libraries will do are the “standard” Voyager data migrations, and not any of the optional loads.
- If your library will not convert any MFHDs (and will instead create new MFHDs as part of the conversion), you will not need the worksheet section on MFHDs at all. Data elements that Voyager stores in the MFHD (such as the call number) are also in the item record section of these worksheets. You should examine both the Voyager item record and its associated MFHD record during your data review process, to verify that the MFHD was created properly.
- You can use the “Current System Record No.” column to record the number that you will use to search for the example records during the review. The different types of records being converted will use different data elements for searching. The most efficient search for bibliographic records is the Original System Number (the bib record control number from your current local system that is mapped to the 035 \$9 in Voyager bib records). For item records, the most efficient search is the item’s barcode number. For patron records, the most efficient searches are by patron barcode or Institution ID. For the charge transactions, the most efficient search is the patron’s barcode.
- You can use the “Pre-migration comments” column for reminders to yourself about what you will be looking for. For instance, if the “notable feature” is that the bibliographic record contains diacritics, use the “Pre-migration comments” column to record exactly which diacritics appear in which fields. Then use the “Post-migration comments” column to record any problems or inconsistencies you encounter. Your library may choose to record the date in each row, or just once on each worksheet. Likewise, your library may choose to record the initials of the tester, or simply to place a ✓ in the final column when the example record has been scrutinized within Voyager.
- Refer to CARLI’s timeline and data review FAQ documents (<http://www.carli.illinois.edu/products-services/i-share/newmem>), so you know what to expect as you test. For instance, at the time item records are loaded initially, Voyager will not show which ones are charged. Charge information will be loaded in a later step; if your current local system supports item routing, items’ route status will not be converted, but you should examine item records in Voyager for items in route in your current local system, to make sure their route status did not confuse the data extract.

- When you look at your selected records in Voyager, remember to look at them through one or more of the staff clients, as appropriate, not through the public catalog(s).
- After data have been extracted from your current local system, **do not edit them** in your current local system. You need to be able to compare data-as-extracted with data-as-converted.
- If you do encounter any problems or inconsistencies in the migrated data, report them **immediately** to the support team at Ex Libris. CARLI Office staff also receive all email posted to Ex Libris' email distribution list. Be sure your email includes the Voyager record number(s) as well as a description of the problem. If possible, also include record numbers from your current local system.

Authority Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
1.	a subject authority record for a heading used by one of your bibliographic records					
2.	a subject authority record for a heading not used by one of your bibliographic records					
3.	a subject authority record with a "see" reference					
4.	a subject authority record with a "see also" reference					
5.	a subject authority record with a scope note (field 680 in the MARC standard)					
6.	a subject authority record with a topical subdivision					
7.	a subject authority record with a geographical subdivision					
8.	a subject authority record with a chronological subdivision					
9.	a subject authority record that contains diacritics					
10.	a name authority record for a heading used by one of your bibliographic records					
11.	a name authority record for a heading not used by one of your bibliographic records					

Authority Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
12.	a name authority record for a personal name					
13.	a name authority record for a corporate name					
14.	a name authority record for a conference name					
15.	a name authority record with a "see" reference					
16.	a name authority record with a "see also" reference					
17.	a name authority record with a scope note					
18.	a name authority record that contains diacritics					
19.						
20.						
21.						
22.						

Authority Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
23.						
24.						
25.						
26.						
27.						
28.						
29.						
30.						
31.						
32.						

Bibliographic Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
1.	a "MARCette" or particularly brief bibliographic record					
2.	a particularly long bibliographic record—one that contains many fields					
3.	a record that contains a few particularly long fields					
4.	a record that contains repeated fields					
5.	a record that contains an 856 field					
6.	a record that contains diacritics in a heading field					
7.	a record that contains diacritics in a note field					
8.	a record at encoding level 8					
9.	a record for each type and bib level combo (am, as, gm, etc.). Use extra worksheet rows.					
10.	a "pre-format-integration" record (no 006 or 007 fields)					
11.	a "post-format-integration" record (a record with an 006 and 007 field)					

Bibliographic Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
12.	a pre-RDA record for an electronic resource (a record with a GMD)					
13.	an RDA record for an electronic resource (a record with 33X fields)					
14.	a record that contains 9XX fields					
15.	records for a bound-with (two or more bibs linked to one holding or item record)					
16.	a record from a Major Microform set or other special one-time batch load					
17.	a record from Marcive or other regular supplier of records					
18.	a record that contains CJK data in an 880 field					
19.	a record to which a large number of item records are attached (perhaps 100+ items)					
20.	a record to which no item holdings records are attached					
21.	a record with a 10-digit ISBN					

Bibliographic Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
22.	a record with a 13-digit ISBN					
23.	a record with an 8-digit OCLC control number					
24.	a record with an OCLC control number of less than 8-digits					
25.	a record with a 9-digit OCLC control number					
26.	a record without an OCLC control number					
27.	a record with data other than the OCLC number in 035 \$a					
28.	a record with data in 035 \$z					
29.						
30.						
31.						
32.						

Bibliographic Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
33.						
34.						
35.						
36.						
37.						
38.						
39.						
40.						
41.						
42.						

MFHD or other Holding Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
1.	a particularly brief holding record (e.g., a MFHD with just an 004 and an 852 field)					
2.	a particularly long holding record—one that contains many fields (250+ items, for instance)					
3.	a “typical” type x MFHD					
4.	a “typical” type v MFHD					
5.	a “typical” type y MFHD					
6.	a record that contains a locally defined call number					
7.	a record that contains a call number with special characters in it (e.g., colon for translation)					
8.	a record that contains an indexed call number prefix				[Prefixes in Voyager are not indexed]	
9.	a record that contains an unindexed call number prefix					
10.	a record that contains both an indexed and an unindexed call number prefix					
11.	a record that contains a call number suffix					

MFHD or other Holding Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
12.	a record that contains an LC call number					
13.	a record that contains a Dewey call number					
14.	a record that contains an NLM call number					
15.	a record that contains a SuDoc call number					
16.	a record that contains no call number					
17.	a record that contains an explicit "copy 1"					
18.	a record without an explicit copy number					
19.	a record for multiple single-volume copies					
20.	a record for one multi-volume copy					
21.	a record for multiple multi-volume copies					
22.	a holdings record with a URL in a field other than 856 (MFHD 866?)					

MFHD or other Holding Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
23.	a MFHD record with a URL in the 856 field only					
24.	a record with multiple 856 fields					
25.	a record with a summary holdings statement (866 field)					
26.	a record with multiple levels of chronology					
27.	a record with multiple levels of enumeration					
28.	a record with complex holdings, in which the sequence of display is very important					
29.	a record with barcoded items					
30.	a record with pseudo-barcoded items (system-supplied barcodes of some sort)					
31.	a record with unbarcoded items					
32.	a record linked to multiple bibliographic records (a bound-with)					
33.	a record with a copy-level public note					

MFHD or other Holding Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
34.	a record with an item-level public note					
35.	a record with a copy-level staff note					
36.	a record with an item-level staff note					
37.						
38.						
39.						
40.						
41.						
42.						

Item Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
1.	a barcoded item					
2.	an unbarcoded item					
3.	a pseudo-barcoded item (with a system-supplied or "dummy" barcode)					
4.	an item with volume enumeration				Also verify MFHD record	
5.	an item with an explicit copy number in an enumeration field				Also verify MFHD record	
6.	an item with a non-zero replacement price recorded					
7.	an item with a replacement price of \$0.00 recorded					
8.	a non-circulating item					
9.	an item with a circ note					
10.	an item linked directly to a bib record (no intervening holdings record)				Also verify MFHD record	
11.	an item formerly on reserve ("inactive" reserve or record flagged for later deletion)					

Item Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
12.	an item whose "owning" location is different from its "permanent" location				Also verify MFHD record	
13.	an item whose "permanent" location is different from its "temporary" location				Also verify MFHD record	
14.	a record with many historical circulation transactions tallied					
15.	a record with zero historical circulation transactions tallied					
16.	an item linked through a holding record to more than one bibliographic record				Also verify MFHD record	
17.	an item linked directly to more than one bibliographic record				Also verify MFHD record	
18.	an item marked damaged					
19.	an item marked missing					
20.	an item marked claimed lost					
21.	an item marked claimed returned					
22.	an item marked withdrawn					

Item Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
23.	an item marked en route or in transit				[en route or in transit status is not converted]	
24.	items with multiple statuses (damaged+withdrawn, etc.). Use extra worksheet rows.					
25.	an item for each location-item type pair on your library's ABBA table					
26.	a record that contains a locally defined call number				Also verify MFHD record	
27.	a record that contains a call number with special characters in it (e.g., colon for translation)				Also verify MFHD record	
28.	a record that contains a call number prefix (add additional examples for all prefixes used)				Also verify MFHD record	
29.	a record that contains a call number suffix (add additional examples for all suffixes used)				Also verify MFHD record	
30.	a record that contains an LC call number				Also verify MFHD record	
31.	a record that contains an NLM call number				Also verify MFHD record	
32.	a record that contains a Dewey call number				Also verify MFHD record	

Item Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
33.	a record that contains a SuDoc call number				Also verify MFHD record	
34.	a record that contains no call number				Also verify MFHD record	
35.	a record that contains an explicit "copy 1"				Also verify MFHD record	
36.	a record that contains an explicit copy number other than "copy 1"				Also verify MFHD record	
37.	a record without any explicit copy number				Also verify MFHD record	
38.	record(s) for multiple single-volume copies				Also verify MFHD record	
39.	a record for one multi-volume copy				Also verify MFHD record	
40.	record(s) for multiple multi-volume copies				Also verify MFHD record	
41.	a record linked to multiple bibliographic records				Also verify MFHD record	
42.	a record with a title/copy-level public note				Also verify MFHD record	
43.	a record with an item-level public note					

Item Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
44.	a record with a title/copy-level staff note				Also verify MFHD record	
45.	a record with an item-level staff note					
46.	record(s) with complex holdings, in which the sequence of display is very important				Also verify MFHD record	
47.	an "on-the-fly" item record				Also verify bib and MFHD record	
48.						
49.						
50.						
51.						
52.						
53.						
54.						

Item Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
55.						
56.						
57.						
58.						
59.						
60.						
61.						
62.						
63.						
64.						

Patron (Borrower) Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
1.	one record for each "patron type" or "borrower class." Use extra worksheet rows.					
2.	a library-use ID (e.g. a patron record for "lost" or "mending" or "new bookshelf")					
3.	a record for an institutional borrower (e.g., another library)					
4.	a record with data in both the personal and institution name fields, if these are separate					
5.	a record with a middle name					
6.	a record with punctuation in the name (a hyphen, a period after an initial, etc.)					
7.	a record with a title (Miss, Dr., etc.)					
8.	a record with a suffix (Jr., III, etc.)					
9.	a record with a note					
10.	a record with multiple notes					
11.	a record marked "problem patron" or with blocked privileges					

Patron (Borrower) Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
12.	a record with data in the SSN field				[SSN data will not be converted to Voyager]	
13.	a record without an Institution ID				[these records should be rejected by the conversion]	
14.	a record with a previous or superseded barcode number					
15.	a record with more than one current/ active ID					
16.	a record for which a duplicate exists (multiple statuses or affiliations?)					
17.	a record with a multi-line address					
18.	a record with a one-line address					
19.	a record with two or more addresses of the same record type (e.g., temporary)					
20.	a record with two or more addresses of different record types (e.g., permanent and temporary)					
21.	a record with an email address					

Patron (Borrower) Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
22.	a record with a telephone number					
23.	a record with a fax number					
24.	a record with a cell/mobile phone number					
25.	a record for each statistical category your library uses					
26.	an "unverified" or "inactive" (but not expired) record					
27.	a record in which the primary library/affiliation is different from the current affiliation					
28.	a record for each ID type used locally (barcode with and without check digit, prefixes,					
29.	an expired record that will not be purged before migration (because of charges or fines)					
30.	an expired record that will be purged before migration				[purged records should not appear in Voyager]	
31.	a record with the historical charges counter set to a number other than zero					
32.	a record with the claims returned count set to a number other than zero					

Patron (Borrower) Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
33.	a record with the self-shelved counter set to a number other than zero					
34.	a record with the lost items count set to a number other than zero					
35.	a record(s) with any of the other counts (fields 44-51 in the Patron SIF) set to a number other than zero					
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37.						
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39.						
40.						
41.						
42.						

Patron (Borrower) Records

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
43.						
44.						
45.						
46.						
47.						
48.						
49.						
50.						
51.						
52.						

Charge Transactions

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
1.	a charged item					
2.	an overdue item				[Status of "Overdue" is usually not applied during loads, but you should verify the due date.]	
3.	a case where only one of several items attached to a single copy or title is charged					
4.	a case where all items attached to a single copy or title are charged to one patron					
5.	all items attached to a single copy or title are charged, but to different patrons					
6.	a case where many (100+) items are charged to a single patron					
7.	an item that has been renewed				Status of "Renewed" is usually not applied during loads, but you should verify the due date.]	
8.	a recently discharged item (in the "shelving" status at the time of the extract)					
9.	an item charged to a patron affiliated with another I-Share library					
10.						
11.						

Charge Transactions

#	Notable Features	Current System Record No.	Pre-migration comments / date	Voyager Record No.	Post-migration comments / date	✓ / initials
12.						
13.						
14.						
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