



## **New I-Share Libraries Project Orientation Webinar**

June 20, 2013



### **Today's Agenda**



- Introductions
- Brief overview of I-Share
- Overview of the data migration process
- Project timeline and deadlines
- Next steps



## CARLI and I-Share



- CARLI
  - Consortium of Academic and Research Libraries in Illinois
  - Currently serves over 140 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 7.2.5
  - Currently used by 80 CARLI libraries
  - “Class of 2013” will make 86 I-Share libraries



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## CARLI Staff



- Susan Singleton, Executive Director
- CARLI staff includes
  - Librarians
  - Programmers, data specialists, and networking staff
  - Business office staff
  - Communications staff
- Most CARLI staff are based in Champaign, IL
- CARLI is part of the University of Illinois, but separate from the UI libraries
- Staff directory:  
<http://www.carli.illinois.edu/about/about-office.html>



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## 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



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## Ex Libris Group



- Develops and sells Voyager and other products
- I-Share libraries 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/>



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## Ex Libris and CARLI Staff on this Project



- Ex Libris
  - Data Services Manager Russell Thompson
  - Data Migration Technician David Sellers
- CARLI staff will serve as liaisons between your staff and the Ex Libris staff
  - Jen Masciadrelli, Project leader
  - Cathy Salika, Associate Director
  - Kristine Hammerstrand, Director, User Services



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## New I-Share Libraries—2013



- College of DuPage (Glen Ellyn): COD
- JKM Library (Chicago): JKM
- Lincoln College (Lincoln): LNC
- MacMurray College (Jacksonville): MMC
- Plus 2 other Voyager libraries migrating to CARLI servers in June 2013:
  - Kishwaukee College (KIS)
  - Univ. St. Mary of the Lake/Mundelein (SML)



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## I-Share's (Voyager) Functions



- Online catalog web interfaces: WebVoyage Classic and VuFind
- Acquisitions and Serials Management
- Cataloging
- Circulation and Reserves
- Universal (union) Catalog: I-Share
- Universal Borrowing: I-Share resource sharing



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## I-Share's Local and Shared Catalogs



- Separate Voyager database for each institution
  - Search your library (only) or any one I-Share library
  - For example: EIU <https://vufind.carli.illinois.edu/vf-eiu>
- Search all I-Share libraries together through the I-Share Union Catalog (UC), aka the Universal Catalog
  - De-duplicated bibliographic records
  - Current item status info from each library's database
  - Place requests for items owned by any I-Share library
  - <https://vufind.carli.illinois.edu/all/vf/>
  - Also serves as a source for bibliographic catalog records



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## Computers, Data and People



- Three focus areas of this project: computers, data, people
  - Computers
    - Creating each new library's Voyager database on CARLI's servers
    - Installing Voyager client software on your library staff PC's
  - Data
    - Copying ("extracting") data from your current library system
    - Translating ("mapping") your data into Voyager formats
    - Loading ("migrating") your data onto CARLI's servers
  - People
    - Training library staff to use Voyager
    - Helping you make your implementation decisions



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## Computers: CARLI's



- On CARLI's servers we will create for your library:
  - An FTP directory to and from which you may transfer data files
  - A Voyager test database
    - Place to load your data for testing and review
    - Not in the public view
    - Separate test database for each I-Share library
  - A generic Ex Libris Voyager training database
  - Eventually, a "production" database (i.e., your working system)



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## Computers: Libraries'



- A Unicode-compliant web browser on public PC's
- Voyager clients on library staff-use PC's
  - Circulation/Reserves
  - Cataloging
  - Acquisitions/Serials
  - Reporting
    - Voyager reporter client
    - ODBC and Access for some
    - Secure FTP client (SFTP) for sending data to and from CARLI



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## Data Migration Overview



- A copy is made of the data in your current system
  - Bibliographic records, holdings/items, circulation status, patron records
  - This may be done by your staff, your current vendor, or another party (whoever runs the current system)
- The data is sent to CARLI via SFTP
- Ex Libris formats data and loads on CARLI test server
- Meanwhile your current system operates as usual
- After test loads are successful, a final copy is made from your current system, and loaded into production I-Share



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## Which Data are Migrated?



- Libraries will migrate these types of data:
  - Bibliographic records, holdings (if applicable), and item records
  - Authority records—yours, or our copy of the full set of LC authorities
  - Patron records
  - Circulation transactions (currently charged/renewed materials)
- We are not going to migrate:
  - Fines/fees (optional; additional cost applies)
  - Recalls (optional; additional cost applies)
  - Vendor records (optional; additional cost applies)
  - Open Purchase Order records (optional; additional cost applies)
  - Serial pattern records (optional; additional cost applies)



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## 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 next 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 (2-5 days, depending on the type of load)
- Have your test review records identified in advance to save time



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## Library's Responsibilities



- Identify a project manager who will “sign off” on your data migrations
- Stay aware of and meet project deadlines
- Get copies of your current data and FTP it to CARLI
- Enter your library's policy settings into Voyager's “SysAdmin”
- Complete a Data Migration Questionnaire (DMQ)
- Prepare an “ABBA” table
- Review your test loads
- Attend training sessions
- Install Voyager clients on your staff PC's



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## In Addition, Library Staff Will...



- Carefully review the results of every type of data load (e.g., verify that all DMQ decisions, mapping decisions, etc. were applied correctly)
- Send problem reports or acceptance of every type of load
  - Ex Libris will not proceed with next load until previous load is formally accepted by the library
- Provide CARLI/Ex Libris with a formal “signoff” (an email note from your project manager) accepting each load by the review deadline
- And to repeat...monitor and meet all project deadlines



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## Data Migration Responsibilities I-Share

- Ex Libris staff will:
  - Consult with your library and CARLI about your data
    - Data migration conference calls and email follow-up
  - Process the data you send
  - Load the data
    - Test loads
    - Production loads
  - Perform some quantity and quality checks
    - e.g., Check that number of records loaded matches the number in the input files



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## Data Migration Responsibilities I-Share

- CARLI staff will:
  - Serve as liaisons between libraries and Ex Libris
  - Prepare documentation on I-Share-specific matters
  - Participate in each data migration conference call
  - Review the data for every load per library
    - Focus on I-Share consortial requirements (e.g., OCLC number formatting, use of item type and patron group codes, etc.)
  - Answer I-Share-specific questions
  - Offer advice based on our experience
  - Remind you about deadlines



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## Data Migration Conference Calls



- July 11-12, Times TBD
- Phone call meeting to discuss your DMQ
- Each library will have its own call
- Participants
  - CARLI staff
  - Ex Libris data analyst
  - Your library's project leader
  - Your library staff that know your data the best



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## Data Migration Conference Calls



- Proposed schedule
  - COD – July 11 (time TBD)
  - JKM – July 11 (time TBD)
  - LNC – July 12 (time TBD)
  - MMC – July 12 (time TBD)



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## Data Migration Conference Call Resources



- Library's completed (first draft) Ex Libris Data Migration Questionnaire (DMQ)  
[http://www.carli.illinois.edu/mem-prod/I-Share/secure/newmem/DMQ\\_concise.doc](http://www.carli.illinois.edu/mem-prod/I-Share/secure/newmem/DMQ_concise.doc)
- CARLI document that supplements the DMQ and Ex Libris migration documentation
  - [http://www.carli.illinois.edu/mem-prod/I-Share/secure/newmem/conv\\_info.pdf](http://www.carli.illinois.edu/mem-prod/I-Share/secure/newmem/conv_info.pdf)



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## DMQ and ABBA Tables



- Data Migration Questionnaire
  - Informs Ex Libris where specific data is found in your extracted bib records
- ABBA Tables
  - The format is an Excel spreadsheet
  - Maps current system location codes and item types to Voyager location codes and item types
  - Sample ABBA table and documentation available from:  
[http://www.carli.illinois.edu/mem-prod/I-Share/newmem/abba\\_sample.html](http://www.carli.illinois.edu/mem-prod/I-Share/newmem/abba_sample.html)



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## Data Migration Resources



- Please bookmark the New I-Share Participating Libraries Resources page:
  - <http://www.carli.illinois.edu/products-services/i-share/newmem>
  - Some documents on this page contain Ex Libris proprietary information and are restricted access
  - You should be able to connect from PCs in your library, as we authenticate by IP number
- New documents will be posted as available



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## Data Migration Overview



- We do the whole process once (or until we get it right) as a test
  - Test data is not in the public view
  - CARLI has a separate computer server for testing
- Then we do the whole process again “for real”
  - We call the real data and servers, “production”
- This allows for a less stressful test period and a shorter “gap” period



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## Data Migration Step by Step– Test Bib Loads



- Library extracts a copy of test bib, MFHD (if applicable), item, and optionally, authority data
  - Test data should be the full set of data, not a subset/ example records
- Test load of bibs/MFHDs/items/authorities (“the bib load”)
  - Maximum 5 day review
  - Do not wait until day 5 to begin review
  - Report errors quickly
  - Library must accept or reject load within 5 days



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## Data Migration Step by Step– Test Patron Loads



- Library extracts and sends a copy of test patron data
  - Test data should be the full set of data, not a subset/ example records
  - Important note: CARLI will not support the migration of patron SSN data to new Voyager databases
- Test load of patron data
  - Maximum 3 day review
  - Library must accept or reject load at end of 3 days



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## Data Migration Step by Step– Test Circulation Loads



- Library does Circ SysAdmin profiling on test server
  - 5 days allotted
  - Plan ahead so you can spend this time just entering data
- Library extracts and sends a copy of test circulation data to Ex Libris
  - Test data should be the full set of data, not a subset/example records
- Test load of circulation data
  - Maximum 2 day review
  - Library must formally accept or reject load at end of 2 days



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## Data Migration Step by Step– Production Bib Loads



- Library copies and sends a final copy of bib, MFHD (if applicable), item, and optionally, authority data
- Library stops all cataloging activity on current system
  - The bib “gap period” begins upon production bib data extract
- Production load of bibs/MFHDs/items/authorities (“the bib load”)
  - Maximum 5 day review
  - Upon acceptance of library is LIVE in Voyager for CATALOGING (only) functions
  - Library has the option to begin using Voyager Acq/Ser at this time (after SysAdmin setup)



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## Data Migration Step by Step– Production Patron Loads



- Library sends final patron data
- Library stops performing patron adds, changes, and deletes in current system
  - The patron “gap period” begins upon production patron data extract
- Production load of patron data
  - Maximum 2 day review



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## Data Migration Step by Step– Production Circulation Loads



- Library does Circ SysAdmin profiling
  - 4 days allotted
  - Sorry, the data cannot be copied from the test load, but we can provide a report of your test entries
- Library copies and sends production circulation data to CARLI
- Library stops all circ activity in current system
  - The circ “gap period” begins upon production data extract
  - Library can use Voyager “offline circulation” during circ gap period for charges (only)



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## Data Migration Step by Step— Production Circulation Loads

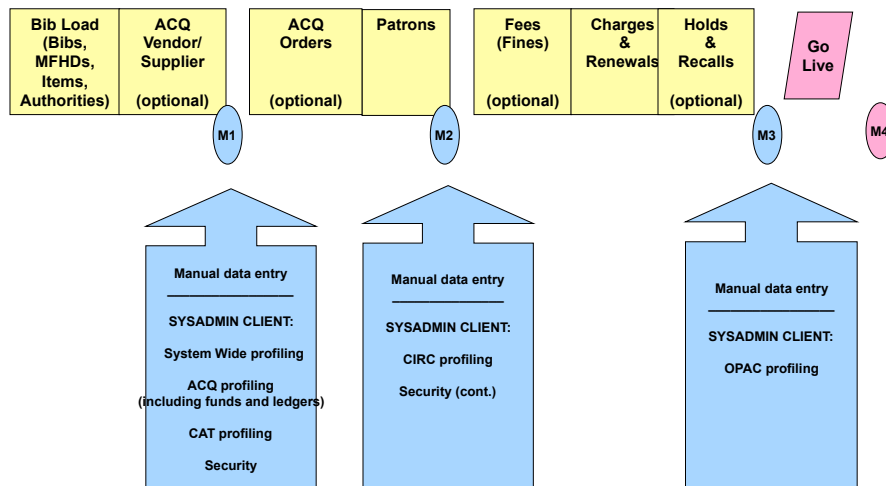


- Production load of circulation data
  - Maximum 2 day review
  - CARLI encourages 1 day review to minimize circ desk disruption
  - Library must accept or reject circ load at end of 2 days
  - Upon acceptance of production circ load, library is LIVE in Voyager for local Circulation and all other local Voyager functionality



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## Voyager Data Conversions Including Manual System Administration Data Entry



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



- If the library staff have had Voyager training, the library may begin to use Voyager “for real” following the last production load of each type:
  - Catalogers may start after the bib load
  - Circulation work may start after the last circ load
  - Acquisitions/Serials work may start after the bib load, if desired
    - Many I-Share libraries wait to start using Acquisitions/Serials in Voyager until the beginning of a new fiscal year
- This means you could start to use Voyager in phases by function, and stop using your current system on the same phased schedule



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## 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 “gap”
  - Either suspend activity 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)



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## Planning to Stop Using Your Current System



- Things to think about and plan for
  - Work with the group that provides you with patron data (IT/admissions/payroll offices, etc.)
  - Think about any final reports you may want to run on the current system
  - Make sure all webpage links to your current system get redirected to your new I-Share URL after “go live”
  - If you are in a shared system now:
    - Consider the date to stop reciprocal borrowing in current system
    - Plan to have your data in that system removed, as it will soon be out of date



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## Identifying Data for Test and Production Load Reviews



- Library must gather example records for verifying the test and production load accuracy
  - CARLI has worksheets to help with this task
    - [http://www.carli.illinois.edu/mem-prod/I-Share/newmem/migr\\_worksheets.pdf](http://www.carli.illinois.edu/mem-prod/I-Share/newmem/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 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 change quickly; you will probably need to update your examples between the test and production load reviews



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## Data Migration and Data Cleanup



- As time allows, consider doing data cleanup projects *before* your production extracts, for example:
  - Merging or deleting duplicate bib records
  - Deleting “On-the-fly” (temporary) records (if not to be converted)
  - 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 duplicated Institution ID for patron records



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## I-Share’s Resource Sharing Components



- Universal Catalog
  - A “union catalog” of all I-Share library holdings
  - Source for locating items to borrow from other I-Share libraries
  - 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



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## Implementing Universal Borrowing



- After all new I-Share libraries are live on Voyager for local circulation functionality, the new libraries' databases must undergo "Universal Borrowing (UB) Integration"
- UB integration allows the separate local databases to "talk" to each other for reciprocal borrowing transactions (either onsite or remote/requests)
  - SysAdmin database definition additions; Patron group mapping; circulation matrices to include UB patrons
  - CARLI staff and the library staff perform different parts of this task
  - January 2014, exact date TBA, but soon after all libraries are live on Voyager for circulation



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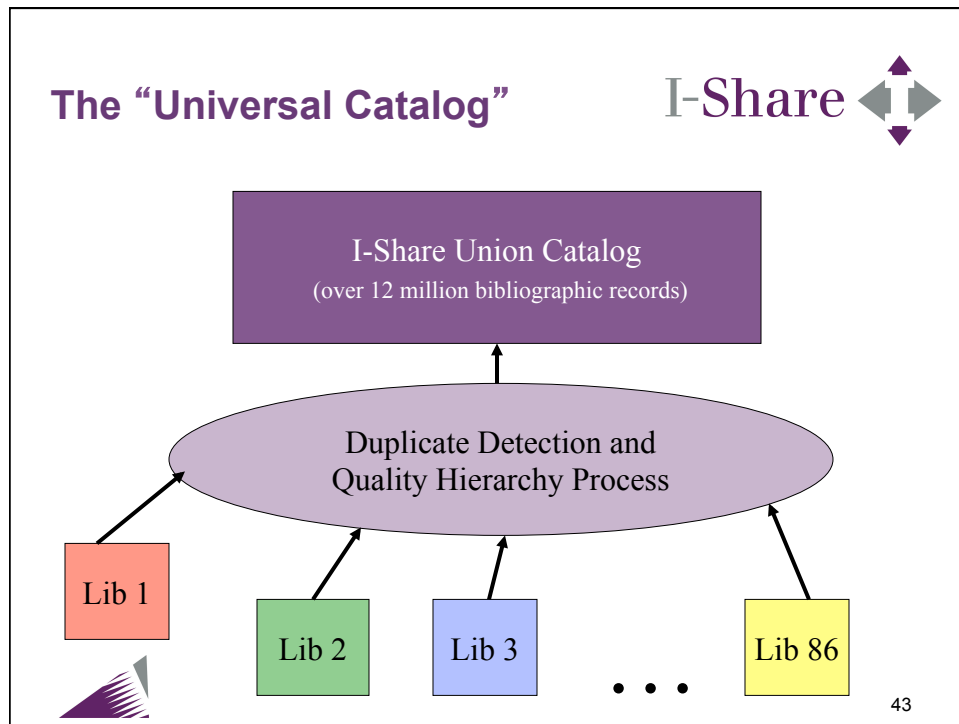
## Adding New Libraries to the I-Share Union Catalog




- 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
  - CARLI staff perform this task
  - Winter 2014, exact date TBA, but after UB integration is complete




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## People

I-Share 

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



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## Training



- CARLI will provide hands-on training in every module of Voyager (circulation, cataloging, etc.)
- We will offer the training sessions throughout the fall/winter, at the CARLI Office in Champaign
- CARLI will train at least 3 staff from each library in each module
  - For libraries with fewer staff, this may cover all training needs
  - For libraries with more staff, staff who attend training sessions will be expected to take the information back to the library and train colleagues, student workers, etc.
- Dates are in your timeline



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## Training Sessions



- Separate sessions will be offered as follows:
  - Project Orientation webinar (Today)
  - Data Migration conference calls with each library
  - Data Review training
  - MFHD Basics workshop
  - System Administration profiling workshop
  - Cataloging client training
  - Circulation client training
  - OPAC staff use and Universal Borrowing training
  - Acquisitions/Serials training
  - Introduction to using Microsoft Access to create Voyager reports



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## Training: Prerequisites and Follow up Activities



- Basic prerequisites for all training sessions:
  - All trainees, regardless of the training session/content, should already be familiar with using Windows
- After the training sessions, use your training database to practice and train others at your library
  - Details about accessing training DBs to be announced



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## 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



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## 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



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## System Administration Workshop



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



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## 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 I-Share Library staff and CARLI staff



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## Circulation Client Training



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



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## 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



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## Acquisitions/Serials Client Training



- ***Note: Using Voyager Acquisitions is 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 I-Share Library staff and/or CARLI staff
  - Will be in Spring 2014



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## Introduction to using Microsoft Access to Create Voyager Reports



- Topics include:
  - Using pre-made queries
  - Creating and modifying queries
  - Importing queries from other sources
- 1 day session
- Taught by CARLI staff
- Will be scheduled Spring 2014



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## Communication



- Most project communication will be by e-mail
- Project materials for libraries will be available on the CARLI website
- Your library must designate one person as “project manager” who will have the “last 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



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## Communication Tools



- With the exception of during the data review process, new libraries should direct questions first to CARLI staff:
  - [support@carli.illinois.edu](mailto: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:
  - [newlibs2013@carli.illinois.edu](mailto:newlibs2013@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](mailto:support@carli.illinois.edu)



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## Other CARLI Communication Options



- CARLI E-mail lists
  - CARLI announce email list: [announce@carli.illinois.edu](mailto:announce@carli.illinois.edu)
  - Subscribers will also receive a monthly CARLI e-mail newsletter
  - List of email lists: <http://www.carli.illinois.edu/email-lists>
- CARLI open meetings and/or webinars
  - See: <http://www.carli.illinois.edu/events>
- CARLI committees
  - See: <http://www.carli.illinois.edu/governance/committee-directory>
- Communicate other I-Share libraries
  - Site visits can be very helpful to see workflows



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## Ex Libris' s Communication Tools



- Ex Libris-authored 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 must print their own
- Ex Libris Customer Center
  - <http://customercenter.exlibrisgroup.com>
  - Login: ILCSO
  - Password: JXQ54XJ5
  - Both Login and Password are case-sensitive
- 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



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## Implementation Timeline



- Timeline is posted on the CARLI website
  - <http://www.carli.illinois.edu/sites/files/i-share/documentation/2013i-sharetimeline.pdf>
  - Let's look at the current timeline now....



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## Recap: Key Materials and Sources for the Project



- 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 own library documentation
  - Your DMQ and ABBA table as submitted to Ex Libris
- 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](mailto:support@carli.illinois.edu)
- Toll free: 1-866-904-5843



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## Your "Homework" from Today's Meeting (first set)



- Start working on your DMQ
  - **DMQ is due July 8**
- Begin planning for your data extraction
  - Test bib/auth/holdings data is due **August 9**
- Start gathering your example records for data review



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## As We Begin Your Project, Remember...



- 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: 80 other libraries have successfully been through this process before you!
- Don't hesitate to contact CARLI with any questions
  - [support@carli.illinois.edu](mailto:support@carli.illinois.edu)
  - Toll free: 1-866-904-5843
- We are glad to have your library becoming a part of I-Share!

