WELCOME TO I-SHARE
KIS & SML

June 14, 2013

Introductions & Agenda

- Introductions & Webinar Housekeeping
- Timeline
- Connectivity & Communication
- System Administration
- Cataloging in the I-Share environment
- VuFind (OPAC)
- Next Steps – UB/UC
- Q&A

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	A	B	C	D	E
1	**Indicates Task is a Deadline for Libraries**	**Whose Task**	**Task Description**	**Start Date 2013**	**Finish Date 2013**
22			PRODUCTION MOVE		
23		Libraries	Libraries stop cataloging and circ on their old systems	6/16/13	6/21/13
24		Ex Libris	Data migration, authority load, CARLI index definition load, and reindexing on voyager-test	6/17/13	6/19/13
25		Ex Libris & CARLI	Testing	6/19/13	6/19/13
26		CARLI	Add CARLI test record		6/20/13
27		CARLI	Add operators for CARLI staff		6/20/13
28		CARLI	Move /m1 and databases from voyager-test to production	6/20/13	6/20/13
29		CARLI	Set up WV and VuFind w/ customizations, including mobile and SFX		6/20/13
30		CARLI	Add libs to the catalog selection dropdown	6/20/13	6/20/13
31		Libraries	File Work Request Online (WRO) Forms for each type of batch desired		6/20/2013/ongoing
32		**Libraries**	**Live for local activity**	**6/21/13**	**6/21/13**
33		CARLI	Run weekly_watcher to verify that there are no SSNs	6/21/13	6/21/13
34	*	CARLI & Libraries	Clean up any stray SSNs	6/21/13	6/21/13
35		CARLI	Set up Voyager batch jobs	6/21/13	6/21/13
36		CARLI	Set up email alternative for notices	6/21/13	6/21/13
37		CARLI	Planned Voyager downtime for System Maintenance	6/21/13 5pm	6/23/13
38	*	Libraries	Create dup detection rules and, if needed, bulk import rules	6/24/13	6/28/13
39		CARLI	Check the rules	6/24/13	6/28/13
40		CARLI	Have OCLC add libs to our daily feed and create backloading accounts	6/24/13	6/28/13
41		CARLI	Set up bib feeds (PCAT, BibNote, MARCIVE, whatever is needed)	6/24/13	6/28/13
42		CARLI	Set up OCLC backloading jobs	6/24/13	6/28/13
43		CARLI	Set up access and batch for any ancillary modules	6/24/13	6/28/13
44		~~CARLI~~	~~Set up EDI and EOD, if needed~~	~~6/24/13~~	~~6/28/13~~
45		CARLI	Look for unprefixed 035s	6/24/13	6/28/13
46	*	CARLI & Libraries	Clean up any unprefixed 035s	6/24/13	6/28/13
47					
48			UB INTEGRATION		
49		CARLI	Create UB patron groups	7/12/13	
50	Training	CARLI & Libraries	Training: VuFind, UB processing (on site at CARLI Office)	7/18/13	7/18/13
51	*	Libraries	Do circ matrix entries for UB patron groups	7/15/13	7/24/13
52	*	Libraries	Set up call slip queues	7/15/13	7/24/13
53		CARLI	run weekly_watcher to proofread the matrices	7/25/13	7/25/13
54		CARLI	UB integration	7/26/13	7/29/13
55					
56			UC INTEGRATION		
57		CARLI	UC loads, initial and ongoing with new libs at the bottom on the hierarchy	7/30/13	8/9/13
58		CARLI	VuFind loads, initial and ongoing	7/30/13	8/9/13
59		CARLI	Start running circ jobs 29, 32, 43	7/30/13	7/30/13
60		**Libraries**	**Live with UB**	**8/9/13**	**8/9/13**
61					
62		Libraries	Request Oracle users for Reporting	anytime	

New I-Share Libraries Website

- http://www.carli.illinois.edu/products-services/i-share/newmem

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Connectivity

- Ensure your campus firewall rules will allow connections to CARLI's servers
  http://www.carli.illinois.edu/products-services/i-share/sysreq/firewall

  If your campus is restricting outbound network traffic and/or using "rate limiting" or "bandwidth shaping", you will need to add firewall rules and/or increase the bandwidth priority for the following CARLI networks:

  192.17.55.128/25 (255.255.255.128)   CARLI Production Servers at UIUC

  204.93.0.128/25 (255.255.255.128)   CARLI Disaster Recovery Servers at UIS

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Connectivity – to our Voyager servers

- Changes to the voyager.ini file on each PC:
  - Example Stanza Edit:
    [Cataloging]
    Server=voyager.carli.illinois.edu
    Port=1xx10
    Timeout=600
- http://www.carli.illinois.edu/products-services/i-share/execute#clients
- Port Information:
  http://www.carli.illinois.edu/products-services/i-share/newmem/port-info

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Connectivity – File Sharing

- SFTP
  http://www.carli.illinois.edu/products-services/i-share/sysreq/secure/SSHSecureShell
- Used to share files from CARLI
  - □ Reports – ad hoc and yearly

- Used to share files TO CARLI
  - □ Patron data for batch load
  - □ Bib data for batch load
  - □ I-Share email alternative configuration files

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Highlights of CARLI Web site

- http://www.carli.illinois.edu/products-services/i-share/i-share-documentation

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Communicating with CARLI

- Scheduling Batch Jobs:
  - □ Work Request Online (WRO) http://wro.carli.illinois.edu
  - □ How to use WRO
    http://www.carli.illinois.edu/using-work-requests-online
- Questions:
  - □ Email support: support@carli.illinois.edu
  - □ Phone (217) 244-7593/Toll Free (866) 904-5843
- Communicating with other CARLI libraries
  - □ Email Distribution lists
    http://www.carli.illinois.edu/email-lists

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System Administration Changes

Debbie Campbell

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Voyager System Administration

- Voyager System Administration settings control the software.
- Your library probably already has (a) Voyager System Administrator(s).
- We realize it may have been a while…
  but you're not starting from scratch.

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Voyager System Administration, continued…

- Three levels of documentation available:

- **Voyager 7.2 System Administration Documentation from Ex Libris.**
  (The Original Books)
  - Available from http://www.carli.illinois.edu/products-services/i-share/vendor-docs
- **Voyager System Administration in I-Share Libraries.**
  (The Reader's Digest Condensed Books)
  - Available from http://www.carli.illinois.edu/products-services/i-share/sysadmin
- **Voyager System Administration in I-Share Libraries: Migrating Voyager Libraries.**
  (The CliffsNotes of documentation)
  - Available from http://www.carli.illinois.edu/products-services/i-share/newmem under "Voyager Documentation" section.
  - Includes Checklist with SysAdmin tasks timed to your migration.

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Screenshot of Checklist

Checklist Voyager System Administration in I-Share Libraries:
Migrating Voyager Libraries 2013

6/14-6/21 SysAdmin tasks/reading

☐ Part **1** System --- **1.** Locations
☐ Part **1** System --- **4.** Print Locations
☐ Part **1** System --- **5.** Miscellaneous
☐ Part **1** System --- **8.** Owning Libraries
☐ Part **1** System --- **11.** Base Currency
☐ Part **2** Security --- **1.** Operator Profiles
☐ Part **2** Security --- **2.** Cataloging Profiles
☐ Part **2** Security --- **3.** Circulation Profiles
☐ Part **2** Security --- **4.** Acquisitions/Serials Profiles
☐ Part **2** Security --- **5.** Master Profiles
☐ Part **3** Circ UB --- **1.** Calendars
☐ Part **3** Circ UB --- **2.** Cluster Maintenance
☐ Part **3** Circ UB --- **3.** Miscellaneous
☐ Part **3** Circ UB --- **4.** Patron Groups
☐ Part **5** OPAC & Search --- **1.** Required Database Definitions
☐ Part **5** OPAC & Search --- **2.** Required Search Configurations
☐ Part **5** OPAC & Search --- **3.** Field Weighting
☐ Part **5** OPAC & Search --- **4.** Material Type Definitions
☐ Part **5** OPAC & Search --- **5.** Circulation Changes for WebVoyage
☐ Part **5** OPAC & Search --- **11.** Optional Updates: Location Limit Groups

*Libraries live For Local Activity 6/21
*I-Share Email Alternative set up 6/21

Voyager System Administration in I-Share Libraries: Migrating Voyager Libraries - Documentation Snapshot

Part 3: Circulation and Universal Borrowing Reference Pages: S.A. 7.2, 5-1 to 5-162

1. Calendars
⊕ Once a calendar has been used, never delete it.
➡ Calendars seem to be a primary cause of UB related issues involving due dates.
➡ How many calendars do you need? The fewer calendars, the easier your circulation administration will be to maintain. However, you will need one circulation calendar for each unique set of days and hours that library activity is available.
☑ Since fixed due dates are globally applied to all item/patron matrices, they violate the UB Standardization Policies. It is recommended that your library does NOT use fixed due dates as UB patrons are affected.

2. Cluster Maintenance
⊘ Do not change the Cluster Code value or the Cluster Name value. Cluster Code should be CLUSTER1, and Cluster Name should be your library name spelled out in full if possible (character limit of 56).

3. Miscellaneous
☑ Email Fine/Fee Notices: CARLI recommends this value be checked. Check this box to activate email notification of Fine/Fee Notices. If no email address is present in the patron record, the statement will be printed.
☑ Email Statement of Fines/Fees: CARLI recommends this value be checked. Check this box to activate email submission of Fine/Fee Statements. If no email address is present in the patron record, the statement will be printed.
⊘ Allow UB Pick-ups from Holding Library: Check or uncheck. Does not apply in our environment.
⊘ Use Demerits: Leave this box unchecked (blank). I-Share libraries do not use this functionality.
⊕ Short Loan Time Buffer: Set this box to zero for now. At this time, I-Share libraries do not use this functionality

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Snapshot of SysAdmin Client
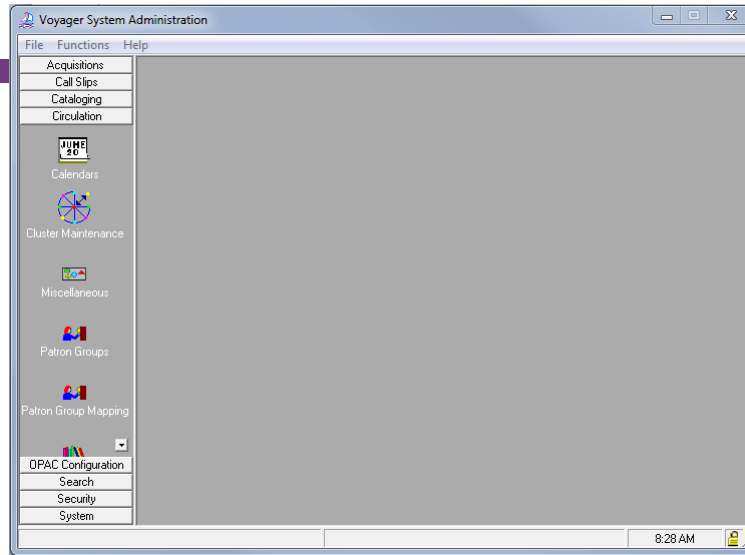
# Cataloging in the I-Share environment

Nicole Swanson

Topics

- Options for adding new records to my local database
- The I-Share union catalog and its impact on local workflows
- Where to find both general and I-Share-specific cataloging resources

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Options for adding new records to my local database

- Bib records
  1. OCLC update/produce transaction
  2. OCLC export transaction/manual import into Voyager
  3. Copy from I-Share union catalog to your local database via cataloging client
  4. Request a batch load of vendor-supplied bib records by filing a WRO
  5. Create new bibs in Voyager clients

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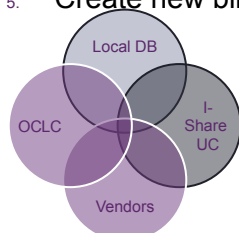
Options for adding new bib records to my local database

1. OCLC update/produce transactions

- Detailed documentation = "Using OCLC For Batch Loading Records into I-Share Databases":
  http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/using_OCLC.pdf

- Benefits: batch load of bibs/MFHDs/items based on minimal coding of OCLC bibs

- Considerations:
  - two working days for OCLC edits to appear in local database
  - bibs not delivered in Unicode format, some characters cause records to be rejected from load

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Options for adding new bib records to my local database (cont.)

2. OCLC export transactions

- I-Share-specific documentation entitled "Importing Bibliographic Records from OCLC to Local Voyager Databases":
  http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/importbibs.pdf

- Benefits: OCLC records immediately available for manual import into Voyager; can be delivered in Unicode format

- Considerations: bib only; staff must manually add MFHD and item records

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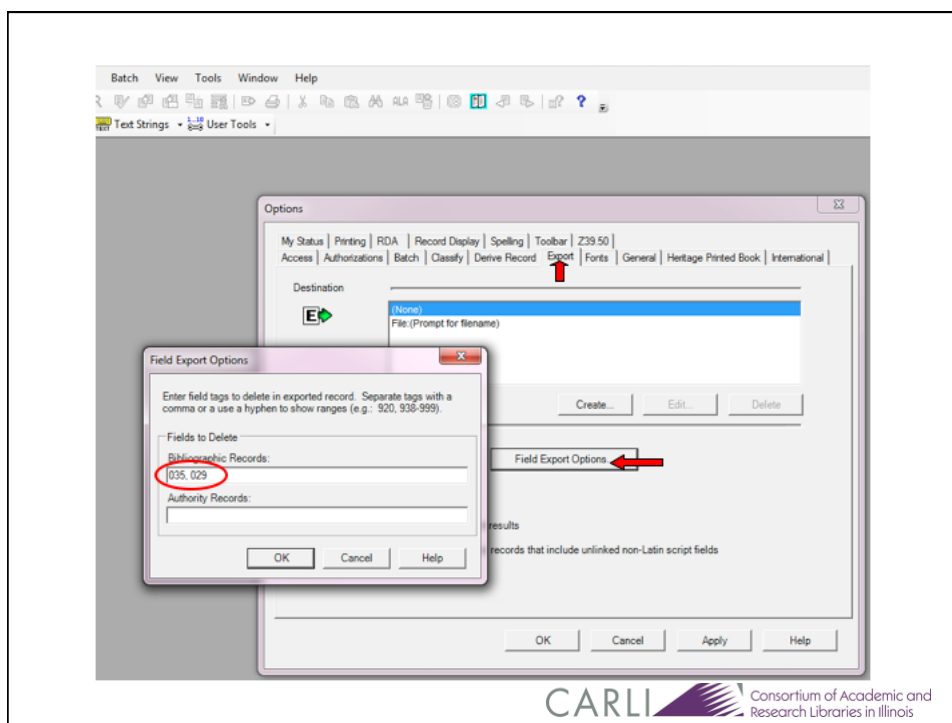
Options for adding new bib records to my local database (cont.)

3. Copy bib from I-Share union catalog

- Remote search of I-Share union catalog via cat client, then Save to Database
  - ❑ See Voyager 7.2 Cataloging User Guide, starting on page 3-69:
    http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_Cataloging_7_2_3_20101001.pdf

- Benefits:
  - ❑ bib records immediately available for Save to DB in Voyager
  - ❑ already in Unicode format

- Considerations:
  - ❑ bib only; staff must manually add MFHD and item records
  - ❑ some records may have "stale" data
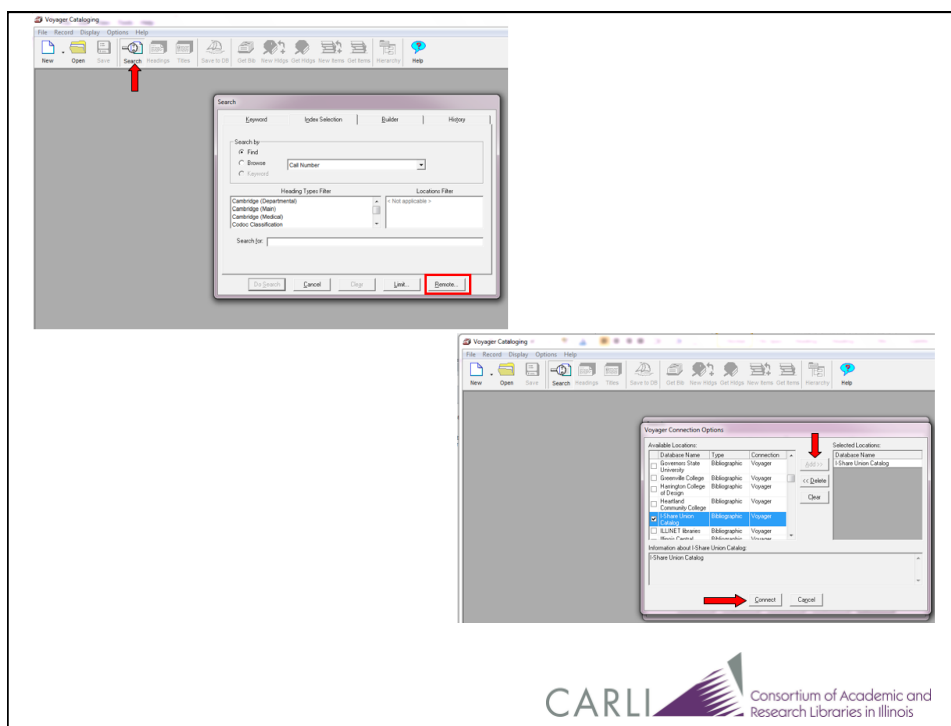
Options for adding new bib records to my local database (cont.)

4. Batch load of vendor-supplied bibs

- Documentation:
  - ❑"Best Practices for Bibliographic Records from Non-OCLC Sources":
    http://www.carli.illinois.edu/products-services/i-share/cat/vendorrecs
  - ❑"CatER2009 Task Force Final Report":
    http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cater2009_finalreport.pdf
  - ❑"Batch Loading Bibliographic Records for Electronic Resources":
    http://www.carli.illinois.edu/sites/files/i-share/documentation/eresbatch.pdf

- Benefits: batch load of bibs/MFHDs/items; many customizations available

- Considerations: data quality; requires a WRO; loads performed as CARLI staff/server resources allow

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Options for adding new bib records to my local database (cont.)

5. Create new bibs in Voyager clients
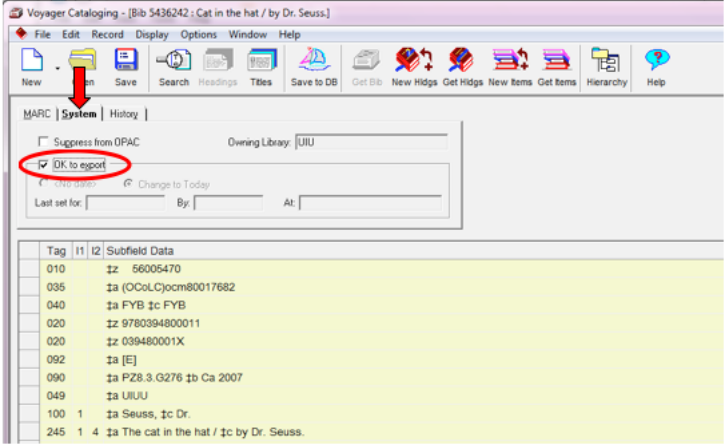
- <u>Only</u> applies to "short" records = used for reserves, Acq ordering, or ephemera.
- Cooperative Cataloging Guidelines policy #4 states: "Full original cataloging must be done through OCLC, not in Voyager."
  http://www.carli.illinois.edu/products-services/i-share/cat/coop-cat-guidelines
  - ❑ I-Share library profiles for "backloading" to OCLC don't support adding new bibs to WorldCat via batch
- Full cataloging = meets national and consortial standards, for the library's permanent collection.
  - ❑ The "Standards for Bibliographic Records in I-Share Databases":
    http://www.carli.illinois.edu/products-services/i-share/cat/bib-standards

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Backloading holdings
(aka batch loading in OCLC lingo)

- When a bib is added to local database via OCLC export, or via copy from UC, or (sometimes) batch load of vendor records, use "backloading" to set your library's holdings in WorldCat.

- All I-Share libraries have been profiled with OCLC for backloading functionality

- Accomplished by clicking the "OK to export" option in bib record's System tab, or via bulk import parameter (specified in WRO)

- CARLI scripts later extract applicable bibs from local database and submit to OCLC to add holdings in WorldCat

- Documentation available from:
  http://www.carli.illinois.edu/products-services/i-share/cat/oclcbackload

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Options for adding new authority records to my local database

- Most I-Share libraries elected to have CARLI load the full set of LC Name and Subject Authority Files into their local database at time of conversion to Voyager
  - Currently: 9,117, 517 authority records

- CARLI also subscribes to the weekly updates from LC; loaded automatically for these libraries
  - Most libraries do minimal adds/edits for auth recs
 - If needed, these can be manually imported or created within cat client

- Any questions about adding new records into your database?

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I-Share union catalog (UC)

- The UC is a physically separate Voyager database from your local library's Voyager database.
  - De-duplicated bibliographic records
  - Serves as a source for bibliographic records for copy cataloging
  - Current item status information from each library displays via the public catalog
  - Patrons may place requests for items owned by any I-Share library

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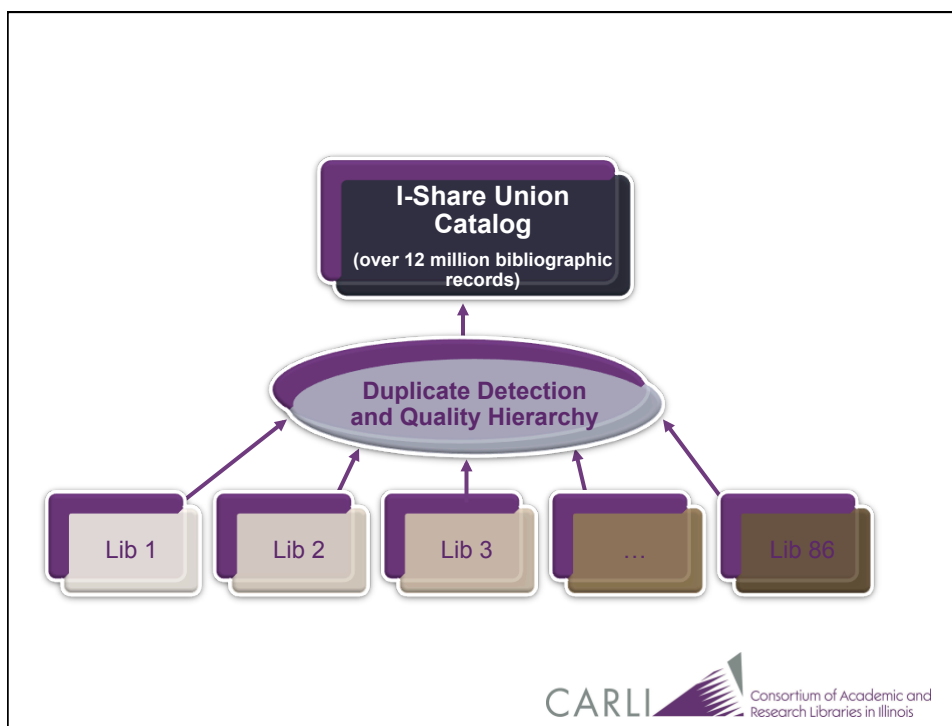
I-Share union catalog (UC)

- Bibliographic data is fed automatically from each local database into the union catalog database (UCdb) daily.

- Transactions in the local database that result in data submitted to the UCdb:
  - New bib records added = UC update
  - Each bib record edited (Save to DB) = UC update
  - Each bib record deleted = UC delete
  - Each bib record suppression = UC delete

- Notice this applies to bib records only.
  - The UCdb contains holdings records (MFHDs), but they are just pointers to the applicable local database and applicable bib ID.
  - The UC public catalog does real-time calls to the local database to retrieve information such as location, call number, item status.

I-Share union catalog (UC)

- When UC updates and deletes are processed each evening, the loader program ("bulk import") makes two determinations:
- (1) Is the incoming bib record already found in the UCdb?
  - Duplicate detection profile specific to the UCdb
  - Primary match point is data from bib 035 $a (usually the OCLC control number or a vendor control number if no OCLC)
  - Also match on <u>combination</u> of LCCN + ISBN, or LCCN + ISSN
  - If the incoming record is not found the UCdb, it is added as new, and a holding record for the local database is also added.

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I-Share union catalog (UC)

- (2) If the incoming record IS already found in the UCdb, which bib record is retained as the "master copy"?
  - Quality hierarchy profile specific to the UCdb
  - Limited options; we use bib record Encoding Level
    - If the incoming record has an equal or higher encoding level than the existing UC record, the existing bib is replaced by the incoming bib, and a MFHD is added to show local library ownership.
    - If the incoming record has a lower encoding level than the existing UC record, a MFHD is added to show local library ownership, but the existing bib is NOT replaced by the incoming bib.
    - http://www.carli.illinois.edu/products-services/i-share/cat/secure/UC-dupdetect

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Implications of the UCdb on local cataloging workflows

1. When should a bib be suppressed from UC?
2. Deleting UC-specific 035s when copying bibs from UC to your local database
3. Suppress/replace workflow for modifying unsuppressed 035s
4. Add 856 $u URLs in MFHDs or MFHDs and bibs
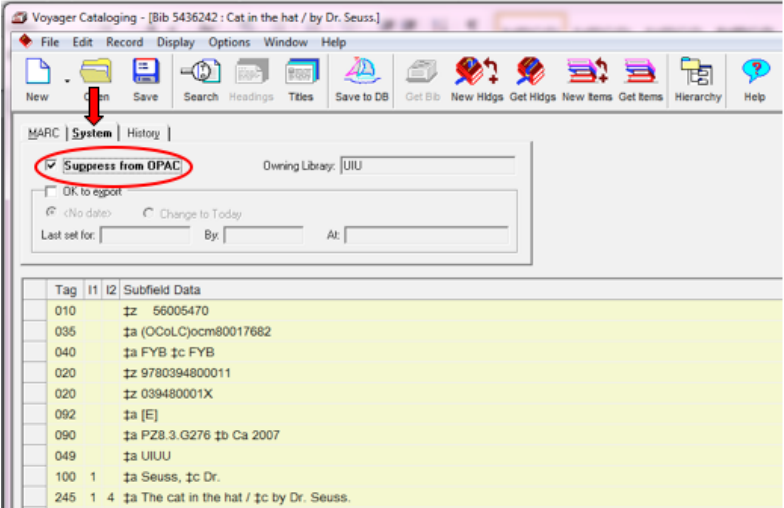5. Tips on practicing safe cataloging for the UC

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Implications of the UCdb on local cataloging workflows

1. Should a particular bib record be excluded from the UC?
Usually, the answer is No; we want your bibs in the UC

Omitting bibs from the UC is done via record suppression.
- OPAC suppress = bib does not display in local public catalog or the UC; flag set on bib record System tab
- Suppress from UC = bib displays in local public catalog but not in the UCdb
  - I-Share-specific functionality ; 049 $u nouc
  - Policy statement about use of Suppress from UC option:
    http://www.carli.illinois.edu/products-services/i-share/acq/uc-suppr-policy
  - Implementing the Suppress from UC option:
    http://www.carli.illinois.edu/products-services/i-share/cat/uc-suppr-049u

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Implications of the UCdb on local cataloging workflows

2. Deleting 035s when copying bibs from UC to local database

- Reminder that the primary field we use for de-duplication in the UC is the 035 $a (usually the OCLC number)
- Special step: With targeted bib displaying in client, before "Save to DB", delete the two (at least) 035 fields that represent the Voyager bib ID of the source bib.
- For example, delete fields that look something like this:
  - 035 $a (EIUdb)1234
  - 035 $a 567890
- Please do NOT delete the OCLC number in format (OCoLC)ocm01234567 or (OCoLC)ocn123456789.
- If in doubt, do not delete 035 field(s).
- http://www.carli.illinois.edu/products-services/i-share/cat/oclcnmbrs

Implications of the UCdb on local cataloging workflows

3. Suppress/replace workflow for modifying unsuppressed 035s

- Reminder that the primary field we use for de-duplication in the UC is the 035 $a (usually the OCLC number)
- There is a special workflow for <u>un</u>suppressed bibs whenever an 035 $a is: added, edited, or deleted.
- This special workflow does <u>not</u> apply to already suppressed bibs (either OPAC suppressed or Suppressed from UC).
- This special workflow does <u>not</u> apply to edits to any bib record fields other than the 035 $a.

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Implications of the UCdb on local cataloging workflows

- Steps:
    1. Suppress the bib without making any changes to the 035 $a
    2. Wait at least an hour
    3. Replace or edit the bib, including the desired change to the 035 $a.

"Safe Bibliographic Record Replacement Routines":
http://www.carli.illinois.edu/sites/files/i-share/documentation/safebibrep.pdf

"Cataloging Workflows in the I-Share Environment":
http://www.carli.illinois.edu/sites/files/i-share/documentation/CatinIShare.pdf

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Implications of the UCdb on local cataloging workflows

4. 856 URLs in MFHDs or MFHDs and bibs

- The 856 $u URL needs to be in the MFHD or display will not translate correctly in the UCdb

- However, CatER Task Force recommended that each library make its own decision on whether or not to also place it in the bib record.
  - R11: http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cater2009_finalreport.pdf

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Implications of the UCdb on local cataloging workflows

5. "Practicing safe cataloging for the UC": http://www.carli.illinois.edu/sites/files/i-share/documentation/pracsafecat.pdf

- Local notes
  - 590 $a local note, or
  - 500 $a local note with $5 XYZ -- (XYZ = OCLC code)
    - Avoid 500 $a without $5

- Local subject headings
  - 6xx x4 $a local subject
  - 69x $a local subject
  - Avoid 650_0 $a

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Implications of the UCdb on local cataloging workflows

- Unwanted subject headings:
  - Leave headings from standard thesauri in bib records; other libraries may require these headings.
  - Ex. MeSH headings: 650 _2 Migraine Disorders.

- New cataloging should be as good as you can get it:
  - Turn on MARC validation and authority validation
    - Options → Preferences → Validation Tab
  - Download I-Share tag tables at:
    - http://www.carli.illinois.edu/products-services/i-share/cat

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- Questions about the implications of the UCdb on local cataloging workflow?

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General documentation

- □ CARLI website:
  http://www.carli.illinois.edu

- □ Links to all I-Share documentation pages:
  http://www.carli.illinois.edu/products-services/i-share/i-share-documentation

- □ I-Share Cataloging-specific documentation:
  http://www.carli.illinois.edu/products-services/i-share/cat

- □ ExLibris Voyager User Guides:
  http://www.carli.illinois.edu/products-services/i-share/vendor-docs

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I-Share-specific cataloging documents

- ▪ Standards/Guidelines:
  - □ Cooperative Cataloging Guidelines:
    http://www.carli.illinois.edu/products-services/i-share/cat/coop-cat-guidelines

  - □ Standards for Bibliographic Records in I-Share:
    http://www.carli.illinois.edu/products-services/i-share/cat/bib-standards

  - □ Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force 2009 Final Report:
    http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cater2009_finalreport.pdf

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I-Share-specific cataloging documents (cont.)

- Adding new records:
  - □ Importing Bibliographic Records from OCLC to Local Voyager Databases:
    http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/importbibs.pdf

  - □ Using OCLC For Batch Loading Records into I-Share Databases:
    http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/using_OCLC.pdf

  - □ Best Practices for Bibliographic Records from Non-OCLC Sources:
    http://www.carli.illinois.edu/products-services/i-share/cat/vendorrecs

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I-Share-specific cataloging documents (cont.)

- Miscellaneous:
  - □ Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance:
    http://www.carli.illinois.edu/products-services/i-share/cat/Cat-maintpriority
  - □ Voyager Cataloging Client Session Defaults and Preferences Configuration:
    http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/catprefpics.pdf
  - □ Safe Bibliographic Record Replacement Routines:

    http://www.carli.illinois.edu/sites/files/i-share/documentation/safebibrep.pdf
  - □ And many more, all linked from:
    http://www.carli.illinois.edu/products-services/i-share/cat

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Additional help

- Voyager cataloging client online help

- Technical Services Interest Group (TechServ-ig) email distribution list
  - Subscribe at http://www.carli.illinois.edu/email-lists

- CARLI Office:
  support@carli.illinois.edu

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VuFind Catalog Interface

Paige Weston

CARLI Consortium of Academic and Research Libraries in Illinois

VuFind and CARLI

- Open Source
  - CARLI's fork
- Only CARLI-supported interface to the I-Share union catalog
- Most I-Share libraries use for local catalog
- Mobile-friendly version available

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What's in VuFind

- Voyager bib data
  - Local catalog: as of 6:45PM yesterday
  - Union catalog: as of 6:45PM day before yesterday
- Voyager holdings, item status, patron data: dynamic
- Voyager location limit group definitions
  - Local catalog: as of 7:45PM yesterday
- User-added tags, favorites, reviews
- HathiTrust and PDA records
- Syndetics elements

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Demo checklist

- Local/All toggle
- Facets
- Advanced search/limits
- Course reserves
- I-Share union catalog holdings displays
- Login and request help
- I-Share as an SFX source

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Useful URLs

- VuFind catalogs
  - Local: http://vufind.carli.illinois.edu/vf-xxx
  - Mobile local: http://m.carli.illinois.edu/vf-xxx
  - I-Share: http://vufind.carli.illinois.edu/all/vf-xxx
- Customization
  - http://www.carli.illinois.edu/products-services/i-share/opac/vufind-customization-form
- FAQ
  - http://www.carli.illinois.edu/products-services/i-share/opac/vufind-faq

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Universal Catalog & Universal Borrowing

Cathy Salika

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Control Numbers

UB Promotes are done based on
  *OCLC#,   LCCN,   ISBN,   ISSN

UC deduping is done based on
  *OCLC#,   ISBN+LCCN,   ISSN+LCCN
  with a "quality" hierarchy

*or other vendor-supplied # in the 035

What's in the UC?

- One bib record for each unique title
- Pointers to the corresponding records in the local databases.
- *Not* the location, call#, or circ status

Bibs flow from your database to the UC every evening automatically.

Bibs flow from the UC to your database *only* if you copy them manually.

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Wrap-up and Q&A

- Where to find us:
  - support@carli.illinois.edu
  - http://www.carli.illinois.edu
    - I-Share Documentation: http://www.carli.illinois.edu/products-services/i-share/i-share-documentation

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