

New I-Share Libraries Project Orientation Webinar

January 15, 2016

Today's Agenda

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

Introductions



Susan Singleton
CARLI Executive Director and Assistant Vice
President for Academic Affairs



Kristine Hammerstrand
Director, User Services



Jen Masciadrelli
Senior Project Management Coordinator
Project Lead for New Libraries

Welcome “I-Share Class of 2016”

- 3 new I-Share Members
 - Black Hawk College
 - Meadville Lombard Theological School
 - South Suburban College

CARLI and I-Share

- CARLI
 - Consortium of Academic and Research Libraries in Illinois
 - Currently serves over 135 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 84 CARLI libraries
 - “Class of 2016” will make 87 I-Share libraries

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CARLI Office & Staff

- Susan Singleton, Executive Director
- As of January 2016: 26 staff, including:
 - Librarians
 - Programmers, data specialists, and networking staff
 - Website manager
 - Business manager and assistants
 - Communications manager
- 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

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/>

Ex Libris Staff on your Implementation Project

- Data Services Manager and Data Analyst
 - Adriana Pilecky-Dekajlo
- Data Migration Technician
 - David Sellers
- CARLI staff will serve as liaisons between your staff and the Ex Libris staff

I-Share's (Voyager) Functions

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

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

Computers, Data, and People

- Three focus areas of 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
 - Loading ("migrating") your data onto CARLI's servers
 - People
 - Training library staff to use Voyager
 - Helping you make your implementation decisions

Computers: CARLI's

- On CARLI's servers we will create for each 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
 - Eventually, a "production" database (i.e., your working system)

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 (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

- 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

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)

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

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

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

Data Migration Responsibilities

- 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

Data Migration Responsibilities

- 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
 - Medium-level review with eye to consortial needs (e.g., OCLC number formatting, use of “approved” item type and patron group codes, etc.)
 - Answer I-Share-specific questions
 - Offer advice based on our experience
 - Remind you about deadlines

Data Migration Conference Calls

- Phone call meeting to discuss your Data Migration Questionnaire (DMQ)
- Each library will have it's own call, to be scheduled during the week of February 8th.
- Participants
 - CARLI staff
 - Ex Libris data analyst
 - Your library's project leader
 - Your library staff that know your data the best

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
- CARLI document that supplements the DMQ and Ex Libris migration documentation
<http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/Data-conv-2016.pdf>

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/products-services/i-share/newmem/abba-sample>

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

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 server for testing
- Then we do the whole process again “for real”
 - We call the real data and servers, “production”

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

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

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

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)

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

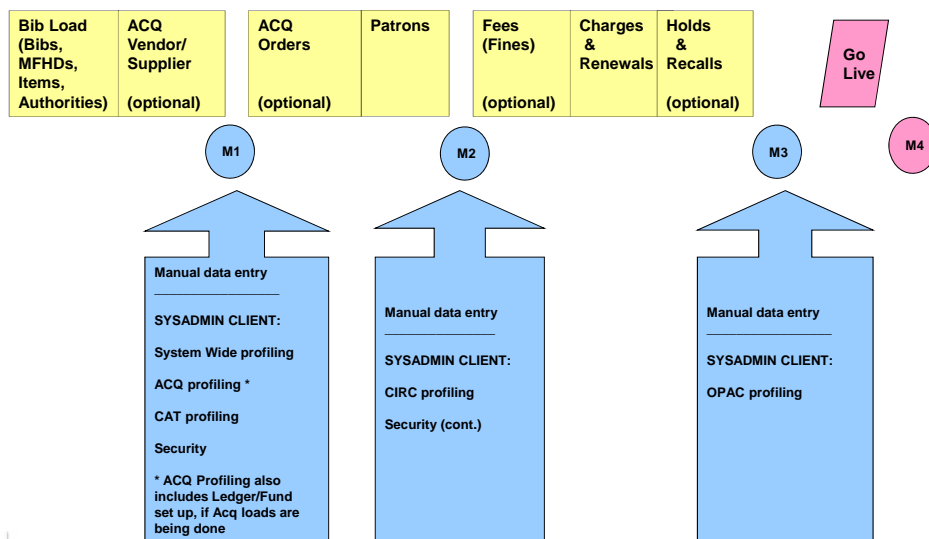
Data Migration Step by Step— Production Circulation Loads

- Library does Circ SysAdmin profiling
 - 4 days allotted
 - Unfortunately SysAdmin profiling cannot be copied from test cycle. We will provide reports to help you reproduce your settings.
- Library copies and sends production circulation data
- 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)

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

Voyager Data Conversions Including Manual System Administration Data Entry



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

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)

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

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/sites/files/i-share/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 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

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

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

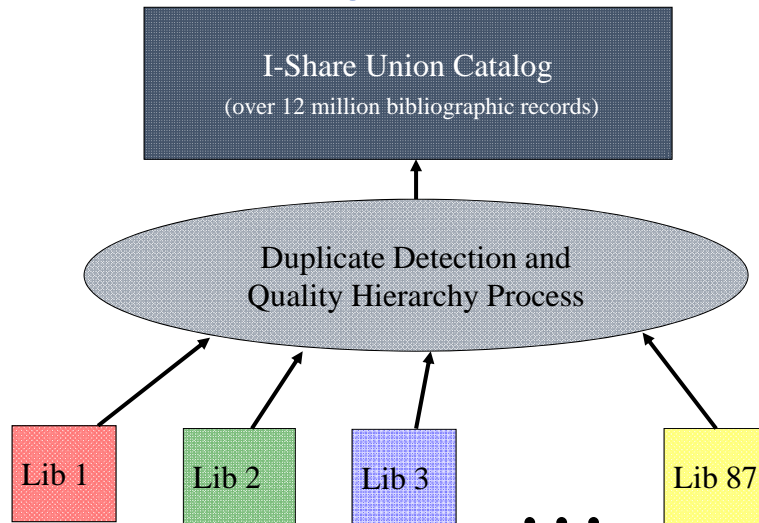
Implementing Universal Borrowing

- 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
 - July 2016, 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
 - CARLI staff perform this task
 - July 2016, exact date TBA, but after UB integration is complete

The “Universal Catalog”



People

- 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

Training

- CARLI will provide hands-on training in every module of Voyager (circulation, cataloging, etc.)
- We will offer the training sessions throughout the Spring, 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.
- Updated dates on next slide, and on updated timeline

Training Sessions

- Separate sessions will be offered as follows:
 - Project Orientation webinar – Today
 - Data Migration conference calls with each library – Week of 2/8
 - MFHD Basics workshop – February 24 (snow date February 25)
 - Data Review training – March 9 (snow date March 11)
 - System Administration profiling workshop – April 14
 - Cataloging client training – May 5-6
 - Circulation client training – May 17-18
 - OPAC staff use and Universal Borrowing training – May 17-18
 - Acquisitions/Serials training – early July
 - Introduction to using Microsoft Access to create Voyager reports – early July

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'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

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

Circulation Client Training

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

- 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
 - *Note: Using Voyager Acquisitions is optional.*

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

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

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:
 - newlibs2016@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
 - Subscribers will also receive a monthly CARLI e-mail newsletter
- CARLI has a number of 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 called “Forums”
 - 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'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 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

Implementation Timeline

- Timeline is posted on the CARLI website
 - http://www.carli.illinois.edu/sites/files/i-share/documentation/20160115_timeline.pdf
- Let's look at the current timeline now....

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
- Toll free: 1-866-904-5843

Your “Homework” from Today’s Meeting (first set)

- Start working on your DMQ
 - **DMQ is due February 5**
- Begin planning for your data extraction
 - Test bib/auth/holdings data is due **March 1**
- Start gathering your example records for data review

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: 84 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