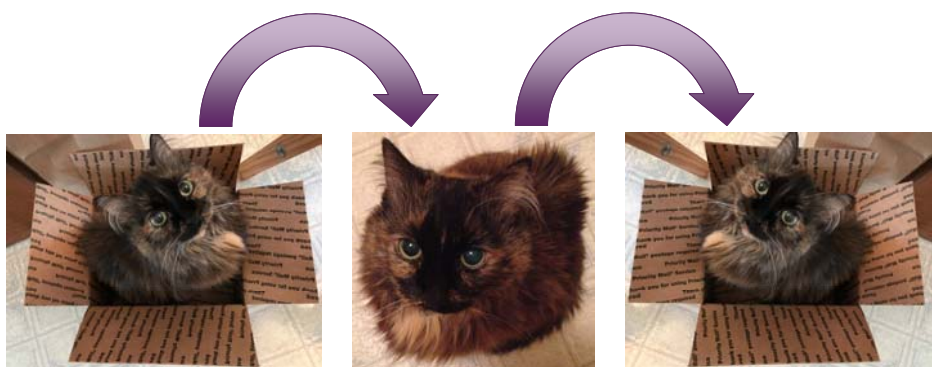




# NEW I-SHARE LIBRARIES DATA MIGRATION WEBINAR

September 7, 2017

## Data Migration Overview



## Data Migration Overview: Data Migration is Incremental

We follow a specific order for this process:

1. Fill out surveys to assist Ex Libris in moving your data.
2. Bib, holding, item, and authority records (bib load)
3. Patron records (patron load)
4. Circulation transactions (circ load)

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## Data Migration Overview: Data Migration is Incremental

We do the whole process as a test:

- Test data is not in the public view.
- CARLI has a separate server for testing:  
[voyager-test.carli.illinois.edu](http://voyager-test.carli.illinois.edu)

Then we do the whole process again “for real”:

- We call the real data “production.”
- Process is done again on the same voyager-test server, and copied to our live Voyager production server when complete.

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## Data Migration Overview: Data Migration is Incremental

- 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 the test loads (2-5 days, depending on the type of load).
- You will want to identify, in advance, a set of records you will check for accuracy.

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## Data Migration Overview: Responsibilities at Your Library

- Identify a library staff member to serve as your project manager. They will serve as CARLI's primary contact during the project and will "sign off" on your data migration reviews.
- Complete a Data Migration Questionnaire, aka "DMQ" (Tells Ex Libris how the data you send us will be formatted) and associated "Follow-up" survey.
- Prepare an "ABBA" table (An Excel sheet of your current locations and item types and the location and item types you will use for each in Voyager).

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## Data Migration Overview: Responsibilities at Your Library

- FTP copies of your current data to CARLI for test and final loads.
- Help CARLI enter your library's policy settings into Voyager's "SysAdmin".
- Review your test data.
- Send staff to CARLI's training sessions and provide training for additional staff who do not attend.
- Install Voyager clients on your staff PCs.

For any step in the process:

- Ask questions whenever you need help or a clarification.
- Stay aware of and meet all project deadlines.

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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 via IP address.

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## Data Migration Resources

Items that will be discussed today (all links available from New I-Share Participating Libraries Resources Page):

- Voyager Data Conversion Information (DCI)
  - [https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/dataconv\\_2017.pdf](https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/dataconv_2017.pdf)
- Voyager Data Migration Questionnaire (DMQ)
  - [https://www.carli.illinois.edu/sites/files/i-share/documentation/DMQ\\_SM.pdf](https://www.carli.illinois.edu/sites/files/i-share/documentation/DMQ_SM.pdf) (printable)
  - <https://www.surveymonkey.com/r/DMQ2018> (direct link to survey)
- DMQ Follow-up Survey
  - <https://www.carli.illinois.edu/sites/files/i-share/documentation/DMQ-followup-SM.pdf> (printable)
  - <https://www.surveymonkey.com/r/DMQfollowup> (direct link to survey)
- ABBA Table
  - <https://www.carli.illinois.edu/products-services/i-share/newmem/abba-sample>

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## Data Migration Resources:

### Voyager Data Conversion Information (DCI)

- [https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/dataconv\\_2017.pdf](https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/dataconv_2017.pdf)

Explains the Data Migration process, divided in the following sections:

- G – In General
- B – With regard to Bibliographic Records
- A – With regard to Authority Records
- M – With regard to the creation and conversion (M1-M9) of holdings data that exists but is not in MFHD format (applies to this group).
- I – With regard to Item Records
- P – With regard to Patron Records
- C – With regard to Charge Records
- Appendices about the ABBA table, Item Types, and Patron Types

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## Data Migration Resources: Data Migration Questionnaire (DMQ)

Complete the Data Migration Questionnaire, aka “DMQ” (Tells Ex Libris how the bib and item data you provide will be formatted).

- Bib Data is in MARC format. No interpretation is needed for properly formed MARC records.
- Holding and Item Data may be placed in variable fields at extraction. The DMQ informs where these data will be found in your records.
- Printable version of the Survey:  
[https://www.carli.illinois.edu/sites/files/i-share/documentation/DMQ\\_SM.pdf](https://www.carli.illinois.edu/sites/files/i-share/documentation/DMQ_SM.pdf)
- Survey Monkey survey for ease of entry:  
<https://www.surveymonkey.com/r/DMQ2018>

## Data Migration Resources: DMQ Example

- 7 In which field will we find the current barcode?  
*examples include 852 \$p, 949 \$e, field\_06, etc.*
- 8 In which field will we find the item type?  
*examples include Ldr 6-7, 949 \$f, field\_07, etc.*
- 9 In which field will we find Enumeration?  
*examples include 852 \$v, 949 \$g, field\_08, etc.*
- 10 In which field will we find Chronology?  
*examples include 949 \$h, field\_09, etc.*
- 11 In which field will we find the Year?  
*Examples include 949 \$i, field\_10, etc.*
- 12 In which field will we find the Copy Number?  
*Examples include 852 \$t, 949 \$j, field\_11, etc.*

## Data Migration Resources: DMQ Example

There are three example columns below, showing selections made by some previous institutions. You should fill in the "Your data" column.

Example #1 = example of source data assuming 852 field is an item level holding field on the bib record  
 Example #2 = example of source data assuming 949 field is an item level holding field on the bib record  
 Example #3 = example of source data assuming an ASCII delimited file with one specified delimiter value  
**Your data** = specify in this column, the MARC field/subfields of the item level field, or else the delimited file fields, which are appropriate for Ex Libris to use in the creation of mfhd for loading.

Please fill in the 'Your data:' column below with the appropriate field/subfield data. You can follow the examples shown in the first three columns: Examples (#1 #2 #3).

Examples (#1 #2 #3)			Your data: field/subfield	Voyager MARC-MFHD record	
#1	#2	#3		MFHD Record:	Usage:
001	001	field_01	_____	014 \$a	Linkage to bibliographic record
852 \$a	949 \$a	field_02	_____	852 \$b	Location
852 \$k	949 \$b	field_03	_____	852 \$k	Prefix
852 \$h	949 \$c	field_04	_____	852 \$h	Call Number
852 \$i	949 \$d	field_05	_____	852 \$i	Cutter

## Data Migration Resources: DMQ Follow-up Questions

- Questions refer to specific parts of the DCI.
- Specific questions about your current data and practices based on information that is variable coming from each new library.
- <https://www.carli.illinois.edu/sites/files/i-share/documentation/DMQ-followup-SM.pdf> (printable)
- <https://www.surveymonkey.com/r/DMQfollowup> (direct link to survey)

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## Data Migration Resources: DMQ Follow-up Questions

Questions about migration of your bibliographic data.

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

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

- Yes  
 No

If yes, please elaborate on content of 949 field.

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

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

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

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## Data Migration Resources: DMQ Follow-up Questions

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

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

I acknowledge the 856 data will be copied.

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

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

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

LC

Dewey

Other

if you answered 'Other' Above please describe the scheme:

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

## Data Migration Resources: ABBA Table

The format is an Excel spreadsheet with 4 columns

- Maps current system location codes (A) and item types (B) to Voyager item types (B) and Voyager location codes (A).
- Sample ABBA table and documentation available from: <http://www.carli.illinois.edu/products-services/i-share/newmem/abba-sample>.

## Data Migration Resources: ABBA Table

	A	B	C	D
1	<b>A</b>	<b>B</b>	<b>B</b>	<b>A</b>
2	<b>Old Location</b>	<b>Old Material Code</b>	<b>Voyager Item Type</b>	<b>Voyager Location</b>
3	review	review	Error	main
4	stx	BK Nocir	BookN	main
5	stx	BK 16/8/4W	Book1	main
6	stx	Unknown	Error	main
7	ref	BK Nocir	BookN	ref
8	ref	BK 16/8/4W	Error	ref
9	per	SERNocir	SerialN	serials
10	big	BK Nocir	BookN	ref/oversz
11	big	BK 16/8/4W	Book1	oversize
12	avx	BK Nocir	Error	av
13	avx	BK 16/8/4W	Book1	av
14	avx	SER 1W-NO	AVLR	av
15	avx	AV 1W-1D	AVLR	av
16	off	BK Nocir	BookN	liboffice

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## Data Migration Resources: ABBA Table

	A	B	C	D
1	Old Location	Old Type	New Type	New Location
2	review	review	Error	review
3	CATALOGING	BOOK	Error	review
4	DEFAULT	BOOK	Book1	review
5	DEFAULT	ILL-BOOK	Book1	review
6	DEFAULT	NS_ILL_PRT	Book1	review
7	DISCARD	BOOK	Book1	review
8	REFERENCE	BOOK	BookN	ref
9	REFERENCE	REF-BOOK	BookN	ref
10	REFERENCE	RES_ITEM	Error	ref
11	RESERVES	BOOK	Reserve1	reserve
12	RESERVES	DVD_FEAT	VideoN	media
13	RESERVES	NEW_RENTAL	Reserve2	reserve
14	RESERVES	SPEC_COLL	BookLR	reserve
15	RESERVES	SPEC_COLLJ	Book 1	main
16	STACKS	BOOK	Book1	main
17	STACKS	EBK_READER	Reserve3	reserve
18	STACKS	EQUIPMENT	Reserve3	reserve
19	STACKS	FILMSTRIP	OtherN	media
20	STACKS	LARGETYPE	Book1	main
21	STACKS	MAP	MapN	main

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## Data Migration: Test and Production Loads, Data Review

- Data Conference calls with library, CARLI, and Ex Libris staff
  - Week of September 25<sup>th</sup>, 2017
  
- Data Review Training
  - November 2<sup>nd</sup>, 2017
  
- Documentation:
  - I-Share Voyager Bib Load Data Review Procedures
  - I-Share Voyager Patron Record Load Data Review Procedures
  - I-Share Voyager Circulation Transaction Load Data Review Procedures

## Data Migration Resources: Finding Example Records for Data Review

- Data Migration Example Worksheet
  - [https://www.carli.illinois.edu/sites/files/i-share/documentation/migr\\_worksheets.pdf](https://www.carli.illinois.edu/sites/files/i-share/documentation/migr_worksheets.pdf)

**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					

## Data Migration Step by Step: Test Bib Loads

- Library provides a copy of bib, MFHD (if applicable), and item data. Due October 13.
  - 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 provides a copy of test patron data. Due November 14.
  - 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 Circ Loads

- CARLI does Circ SysAdmin profiling on test server.
- Library extracts and sends a copy of test circulation data to Ex Libris. Due December 4.
  - 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 sends a final copy of bib, MFHD (if applicable), item, and optionally, authority data. Due January 12.
- 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 production load and System Administration set up by CARLI, 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. Due February 7.
- Library stops performing patron adds, changes, and deletes in current system.
  - The patron “gap period” begins upon production patron data extract.
- Test Production load of patron data
  - Maximum 2 day review.

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## Data Migration Step by Step: Production Circulation Loads

- CARLI does Circ SysAdmin profiling.
  - 4 days allotted.
- Library sends production circulation data. Due February 27
- 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 Transactions
  - Library must accept or reject circ load at end of 2 days.
  - CARLI encourages 1 day review to minimize circ desk disruption.
  
- Upon acceptance of production circ load, library is LIVE in Voyager for local Circulation and all other local Voyager functionality.

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## Short Term Outlook From Here



- DMQ survey completed by library (9/20/2017)
- DMQ Follow-up survey completed by library (9/22/2017)
- First draft of DMQ submitted by CARLI to Ex Libris (9/22/2017)
- Data review conference calls (week of 9/25/2017)
- Final draft of DMQ (10/13/2017)
- First draft of ABBA tables (10/13/2017)

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Questions?