I-Share Voyager Bib Load Data Review Procedures
(CARLI Office March 2016)

This document contains the procedures that new I-Share participating libraries must follow for testing their bibliographic/authority/MFHD/item record conversion loads ("the bib load") into Voyager.

These procedures will apply to both the test and production bib load cycles, except where specifically noted.

I. Overview

CARLI and Ex Libris Group Ex Libris generally group libraries' bib loads based on size of collection and workflow implications for the Ex Libris Data Analyst for our project. See the I-Share project timeline for the scheduled date of your library's test and production bib loads, available for download from http://www.carli.illinois.edu/products-services/i-share/newmem.

Each library's data review process will begin when Ex Libris staff informs the library's project manager and the CARLI Office that the database is ready for review. Each library will have a maximum of 5 working days (excluding weekends and holidays) to review their bib load data. Past experience has been that the notification comes late in the afternoon of either the first or second day of the bib load task in the project plan. Therefore, the 5-day review period officially begins the day after the bib load task is completed, although libraries are free to begin their review upon receipt of notification that the load has been completed.

Ex Libris staff will create a single "read-only" account for the data review process after the data have been loaded. The Operator ID for this account is "test" and the account password will be "test" (both without the quotation marks, and case-sensitive). The library should not attempt to edit anything in any record as part of the data review process.

The loads will be done on the CARLI test server (voyager-test.carli.illinois.edu). The complete information needed to connect to your database will be distributed with the announcement about the beginning of each library's data review period.

At the end of the review period, if no serious problems are discovered in the load, each library is required to accept their data load formally by having their project manager email their Ex Libris Data Analyst, with a copy to Ishare-team@exlibrisgroup.com.

II. Communication

Ex Libris staff will inform the library's project manager and the CARLI Office when a library's data are ready for review. If there are additional staff in the library that are involved in the data review process who should be notified, it is the library's responsibility to forward the announcement internally.

Ex Libris requires that reports from each library be filtered through one designated contact person, to avoid duplication of the library's, Ex Libris's, and CARLI's efforts. You do not need to inform CARLI or Ex Libris who your designated contact is ahead of time, but please be sure to inform all local library staff who this person is, so that reports are sent to the correct staff member in the local library, for forwarding on to Ex Libris.

Obviously, communication within the library and with Ex Libris/CARLI is key to the success of this part of the project. If your library has not already determined the internal communication process for this task, please do so before the data review process begins.

If any problems with the converted data are discovered in the data review process, or to accept/reject the bib load, the designated contact person must send an email note to the Ex Libris Data Analyst, with a copy to Ishare-team@exlibrisgroup.com. Including the list address ensures that all other appropriate Ex Libris and CARLI staff receive a copy of your correspondence.

Data Analyst David Sellers' email address is: David.Sellers@exlibrisgroup.com

III. Pre-load tasks/documentation needed by each library

Before the data load/review period begins, each library must identify example records for the data review process. A worksheet for this task can be downloaded from http://www.carli.illinois.edu/sites/files/i-share/documentation/migr_worksheets.pdf . Libraries' full data extracts will be loaded at least twice, for test and production. Pre-identifying example records for review will facilitate the data review process.

Staff who will be doing the data review work may also need a copy of your library's completed Data Migration Questionnaire (DMQ), or at least need to be aware of the library's decisions recorded in the DMQ. In addition, data reviewers will need access to your library's final version of the "ABBA table" (the location and item type mapping file), to check the Voyager location and item type mappings, as well as any other mapping tables submitted to Ex Libris to convert your data.

And finally, all staff who will be doing the data review work should have a copy of this document.

IV. Voyager clients

Data reviewers must have the Voyager clients installed on their workstations to do this work. Minimally, the cataloging and circulation clients will be needed for the bib load review process.

CARLI's document on how to download and manually install and configure the Voyager clients is available from http://www.carli.illinois.edu/products-services/i-share/execute/secure/newlibs-install911clients . Note that the clients can and should be installed on each appropriate workstation before the data review process begins, but the bib load process actually creates the database, so there is nothing on the test server to connect to until Ex Libris staff inform the library that the database is ready for review.

V. Reviewing the data

Most of your Voyager bib load data review will be done using the Cataloging client, but if you have converted any "Historical charge" or "Historical browse" data into the Voyager item record, you will use the Circulation client to review those data. You will not use the Acquisitions client or any of the other staff clients as part of the data review process. There should also be no need to use the System Administration client during the bib load data review process.

Please do not rely on VuFind/WebVoyage for your data review. OPAC displays, while important, are a separate issue from the actual data conversion and mapping. The data review process is a very time- and energy-intensive part of the overall conversion to Voyager. OPAC-related questions need to be addressed separately, after the data review process.

Data loaded into Voyager are the data as they were when they were extracted from your current local system. You will need to confirm with whomever did your data extract the actual date of the extract. Before you report that two records you expect to be identical are not identical, be sure to verify that the record in the current local system wasn't changed AFTER the data were extracted.

The most direct way to search for your pre-identified sample bib records is by the local system's bib record control number. These control numbers will have been copied into Voyager bib record field 035 $9, which is an indexed field. To search by local system bib record control number, choose Original System Number (0359) from the Index Selection tab/Search-by drop down box. Then enter the control number in the Search for box. The searches are not case sensitive, but you have to include the complete local system number, including any prefixes or punctuation.

NOTE: to see the MFHDs that are created during conversion, you have to start with the bib record. To do this, you must search for a bib and display the full record. Then click the Get holdings icon.

You can, of course, search by other fields in the bib record if you don't have the local system control number handy. Or you can search by item barcode if you have it in your worksheets. To search by barcode, select Record from the menu bar, and then Retrieve by barcode.

Special note about authority records in the test bib load cycle

Most new libraries choose to accept from CARLI the full set of LC Names and Subject authority files, rather than to convert authority records from the current library system.

To save the considerable amount of processing time it would take to load the full set of LC authority records in each database, for the test bib loads (only), CARLI and Ex Libris load a subset of the LC authority file. This subset consists of 4,806 LC subject authority records and 8,343 LC name authority records. A listing of the 010$a and 1xx data from each of the records in these files is available from the following URLs.

Names subset:
http://www.carli.illinois.edu/sites/files/i-share/documentation/authtestload_names.xls
Subjects subset:
http://www.carli.illinois.edu/sites/files/i-share/documentation/authtestload_subjects.xls

Authority records can be retrieved in Voyager by using the "Staff Name Headings Search" or "Staff Subject Headings Search" (as appropriate, when you are searching for the 1xx field data) or the "Auth LCCN (010a)" search when you are searching for the 010 field data.

For the production bib loads, the full set of LC Names and Subjects files will be loaded into each database (if that was the local decision on the DMQ).

VI. Problem reports

If you discover any problems with the converted data during the data review process, your library's designated contact person must send an email note to the Ex Libris Data Analyst, with a copy to Ishare-team@exlibrisgroup.com.

Ex Libris asks you to follow these procedures when filing problem reports:

[1] Each library's designated contact should report any problems AS SOON AS YOU FIND THEM to your Data Analyst with a cc to the ishare-team list. Please do NOT wait until the end of the review period to send in your problem reports. The sooner you send reports to Ex Libris staff, the sooner they can fix problems.

[2] Libraries should sequentially number their bib load problem reports, and also include the library's three-letter code in the subject line of the email note. This makes it easier to keep track of the problem reports from each library.

The "bib" in this naming convention refers to the bib load in general, and so use "bib" in the subject line, even if you're reporting a problem in an item or MFHD record. (Problem reports about the patron and circ loads later in the project timeline will contain "patron" and "circ" respectively.)

For example, XXX College's bib load problem report emails would use the following subject lines for reports 1-3:

XXX bib report #1
XXX bib report #2
XXX bib report #3

CARLI staff will sometimes file a problem report on behalf of the library. CARLI staff will use the same problem report numbering scheme, so it is possible that library staff may file reports #1 and #3, while CARLI staff file report #2. The goal is for problem reports from each library to be numbered sequentially, no matter who submits them.

[3] Except for summaries of issues already reported, only one issue/problem should be reported per e-mail note. That makes it easier to determine if Ex Libris has responded to each reported issue.

[4] Whenever you report a load problem, you MUST include an example record that demonstrates the problem. When providing an example, always include the original system control number (or barcode number for item records) as well as the Voyager record ID number. Voyager ID numbers change in the event of a reload and between the test and production loads, so having both numbers available aids in troubleshooting. See the FAQ section below for some examples of problem reports.

[5] Each problem report should explain the expected result as well as what is wrong -- it is not always apparent what the correct result is.

[6] Libraries should not send multiple reports for the same problem, even if new examples of the same problem are discovered as the data review continues. Similar or related but separate problems should be reported separately.

[7] If you have a question that relates to I-Share-specific requirements or recommendations, or about these bib data review procedures, please send those questions to the CARLI Office support@carli.illinois.edu address.

VII. Some Frequently Asked Questions during the bib load reviews

The questions and answers below are ones that have been asked during previous I-Share bib load data review periods. They are listed in no particular order.

Question 1:

> We have a question about encoding level from DRA to Voyager. Bib record ID 64876
> (EHT-2138 in DRA) has encoding level "s" in DRA, but in Voyager the encoding level displays as
> "Obsolete Code or Value Not Set"
>
> Similarly, bib record ID 3267 (DYJ-3396 in DRA) has encoding level "I" in DRA, but in Voyager
> the display is "Obsolete Code or Value Not Set".

> Should we be concerned about these?

Answer 1:

Encoding level "s" is not a valid Encoding level for any bib record format, so the display message you see in Voyager is correct for this record. (Actually, technically the code is invalid, rather than obsolete, but the concept is the same).

The reason you are seeing that message for Encoding level I is because by default, a new Voyager cataloging client is installed with the Options/Preferences/Validation/Cataloging formats value set to Marc21. According to the MARC 21 documentation, this encoding level is not valid for strict MARC 21. If you change this client preference setting to OCLC, then you don't get the "obsolete code" display.

The CARLI Office recommends that staff use the OCLC cataloging format preference setting for validation. See the URL below for more information about Cataloging client preference settings.

http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/catprefpics_ver911.pdf

Question 2:

> See DRA bib DBCN: EHK-8617 = Voyager bib record ID 1026409
>
> The 856 link is live in DRA and dead in Voyager. Is this a problem?

Answer 2:

In the Cataloging client, when you are viewing a bib or MFHD record, to make the 856 field "live" you have to go to the Record menu, then select Verify Hypertext links (or type CONTROL+K). This will then allow you to click on the URL to see if it is still valid.

Note, though, that if during the data review you discover that the 856 link is no longer valid, you'll need to compare the URL in the Voyager record with the URL in your current system. If they are the same, this represents a case of "dirty data" rather than a conversion problem that should be reported to Ex Libris. You

can correct the URL in your current system before the production bib load, so that a valid URL is migrated into your Voyager records.

Question 3:

> In the Hierarchy view, after the location information, there is usually a [P]. What does that mean?

Answer 3:

The [P] in the hierarchy view or location hit list means the location is the Permanent location from the Voyager item record.

The other code that you may see here is <u>after</u> you are live on Voyager is [T], which references a Temporary location (e.g., when you put things on reserve, or temporarily move them to the New Book shelf, etc.).

Question 4:

> When I look in my current system at item records, some of them show up as Charged to a
> particular patron. But they aren't charged in Voyager. Why not?

Answer 4:

The charges aren't showing up in Voyager yet because the circulation transaction loads are being done after the bib load.

The only item statuses that will display in the bib load are those that the library elected to convert. See your DMQ response and your library's item status mapping table for the list of statuses that your library elected to convert to Voyager.

Some libraries are not converting any item statuses. In this case, during the data review process, the Voyager item record will always display a status of "Not Charged."

Question 5:

> When I look at bibs in Voyager that have diacritics, I'm seeing a square box instead of the expected
> diacritic. What do I need to do to see the actual diacritic character?

Answer 5:

Since the Voyager database is Unicode-enabled, the PC on which the cataloging client has been installed must have a Unicode font installed, and then the cat client needs to be configured to use that Unicode font.

By nature of the minimum PC requirements for Voyager, all PCs will have at least one Unicode font installed: Lucida Sans Unicode. To use this font in the cataloging client, go to Options/Preferences/Colors-Fonts tab, and in the lower left part of the screen, select Lucida Sans Unicode from the drop-down menu next to Font Name. Then click OK to save this setting.

However, the Lucida font isn't as fully compliant with the Unicode standard as is Arial Unicode MS. Ex Libris (and CARLI) recommends the use of the Arial Unicode MS font for libraries that have mixed language cataloging. Arial Unicode MS is a different font than the "regular' Arial font.

Arial Unicode MS is present on any PC on which the Microsoft Office package (e.g., MS Word, Excel, etc.) is present. This font may not be installed on these PCs, however. To test whether the font is installed, in the Voyager cataloging client, go to Options/Preferences/Colors-Fonts and then display the drop-down menu next to Font Name. If Arial Unicode MS appears in this list, then the font is installed and can simply be selected from this drop-down box in the client.

However, if the PC has the Microsoft Office software on it but the Arial Unicode MS font is not included in the list of available fonts in the cat client's preferences, the font needs to be installed on the PC. Instructions for installing the Arial Unicode MS font are included at the end of the documentation for the new libraries on manually installing the Voyager clients http://www.carli.illinois.edu/products-services/i-share/execute/secure/newlibs-install911clients

Question 6:

> I know my library asked to have the full set of LC authority records loaded instead of converting our
> authority records from our old system. I'm trying to look for Voyager authority records that I know
> should be present in the LC file, but I can't find them. What am I doing wrong?

Answer 6:

For the test bib load, Ex Libris is loading a subset of the full LC authority file. This subset consists of 4,806 LC subject authority records and 8,343 LC name authority records. Please be sure that the authority record you were searching for was included in this subset. The Excel files posted at the URLs below show the 010a and 1xx field data for each record that was loaded into your database during the test load.

Names subset:
http://www.carli.illinois.edu/sites/files/i-share/documentation/authtestload_names.xls
Subjects subset:
http://www.carli.illinois.edu/sites/files/i-share/documentation/authtestload_subjects.xls

Question 7:

> When I search for a particular bib record by the control number from DRA (example = BBA-0940),
> I can retrieve the record I want. But when I search the same record by title, I'm getting the message
> "No matches were found for this search." What gives?

Answer 7:

If the record you are searching for is indeed in the database (as evidenced by being able to retrieve it with the Original System Number search), then the problem is likely that you don't have the cataloging client's Options/Preferences/Work Flow/Automatic truncation for non keyword searches option checked/enabled. CARLI recommends that this preference be enabled for both data review and ongoing production cataloging workflows.

VIII. Accepting the bib load

At the end of the bib load review period, the library's designated contact person must either formally accept or reject the bib load. This is done by the contact person sending an email note to the Ex Libris Data Analyst, with a copy to the ishare-team list. See the Communications section above for the appropriate email addresses.

The content of the acceptance note can be as simple as text stating "XXX accepts the <test/production> bib load" (where XXX represents the library's 3-letter CARLI code).

During the bib load review, the library may discover problems with the data that are acknowledged by Ex Libris to be issues that will be corrected in the production bib load, rather than doing a re-load during the test bib load review period. If this is the case for your library, it is recommended that your formal test bib load acceptance include mention of these acknowledged problems.

For example, in a previous I-Share migration, Library ABC found two problems during the test bib load that Ex Libris staff indicated would be addressed in their production bib load. This library's acceptance of the test bib load looked something like this (name changed to protect the library's identity):

> Library ABC accepts the test bib load, with the following modifications
> to be made for the production load, as previously discussed.
>
> 1. The 940$n data is to be added to the item note field (where the 940$e
> data is also going) for the production load. [ABC bib report #3]
>
> 2. The piece count should be set to a value of 1 for all items that
> either don't have a bib 940 $j at all, or if the bib 940 $j contains a
> value of zero. [ABC bib report #2]

Hopefully this won't be the case, but if the library must reject the bib load, the reason for the rejection must be included in the email note sent to Ex Libris and CARLI.

IX. Getting help

If you have any questions about the content of this document, please contact the CARLI Office at:

support@carli.illinois.edu