I-Share Voyager Circulation Transaction Load Data Review Procedures
(CARLI Office September 2017)

This document contains the procedures that new I-Share participating libraries must follow for testing their circulation/charge transaction conversion loads ("the circ load") into Voyager. These procedures will apply to both the test and production circ load cycles, except where specifically noted.

All staff who will be doing the data review work should have a copy of this document.

I. Overview

Please see the I-Share project timeline for the scheduled date of your library's test and production circ loads, available for download from http://www.carli.illinois.edu/products-services/i-share/newmem.

Your library's data review process will begin when Ex Libris staff informs your library's project manager and the CARLI Office that the database is ready for review. Your library will have a maximum of 2 working days (excluding weekends and holidays) to review your circ load data. Past experience has been that the notification comes in the afternoon of the day of the circ load task in the project plan. Therefore, the 2-day review period officially begins the day after the circ load task is completed, although your library is free to begin your review upon receipt of notification that the load has been completed.

For the production circ load, although technically you have two working days for the review, CARLI strongly encourages you to complete your review in one day. This will result in a shorter "circ gap period" and allow your library to go live in Voyager as soon as possible after circulation ceases on your former system.

Ex Libris staff will create a single "read-only" account for the data review process after the data have been loaded. The Operator ID and password for this account will be provided when your data are available for review. Your library should not attempt to edit anything in any record as part of the data review process.

As with the bib and patron loads, the test circ 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 your library's data review period.

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

II. Communication

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

Ex Libris requires that reports from your library be filtered through one designated contact person, to avoid duplication of your 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 your 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 circulation load, the designated library contact person must send an email to the Ex Libris Data Analyst, with a copy to the I-Share team email address. Including the I-Share team address ensures that all additional appropriate Ex Libris and CARLI staff receive a copy of your correspondence.

Data Analyst David Sellers' email address: David.Sellers@exlibrisgroup.com
I-Share team email address: Ishare-team@exlibrisgroup.com

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

Before the data load/review period begins, your 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.

NOTE: Due to the fluid nature of circulation data, for the production circulation load, your library may need to update your example records used during the test load. For example, an item that was charged to a particular patron at the time of the test circ load may have been discharged and/or borrowed by another patron between the time of the test and production circ loads.

IV. Voyager clients

Data reviewers must have the Voyager Circulation client installed on their workstations to do this work.

CARLI's documentation on how to download, install, and configure the Voyager clients for the data review process is available from http://www.carli.illinois.edu/products-services/i-share/execute/secure/newlibs-install911clients.

The clients can and should be installed on each appropriate workstation before the data review process begins, but since the bib load process actually creates your database, there is nothing on the test server to connect to until Ex Libris staff inform your library that your database is ready for review.

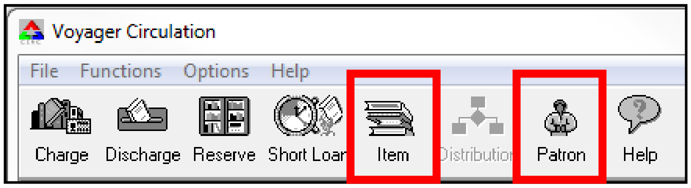
V. Reviewing the data

You will use the circulation client for all of your Voyager circ load data review. You will not need to use any other Voyager client during this phase of the data review.

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. 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 the actual date of the extract with whomever did your data 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 two most efficient ways to search for your pre-identified sample circ records are: using the patron's barcode number and using the item record's barcode number.



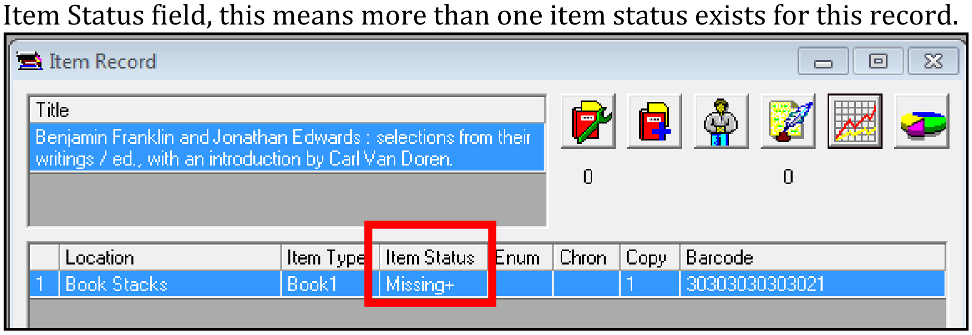
Item icon and Patron icon highlighted in the Voyager Circulation menu bar.

To search for patron records, first select the Patron icon from the menu bar. Then in the Patron Search window, select the radio button next to "Barcode" and type the patron's barcode number into the labeled box. You do not have to enter (or change) any data in the Library field if it appears on this screen. The barcode number search is not case sensitive, but you must include the complete barcode number, including any prefixes.

Once you have retrieved the patron record, select the Charged Items index icon (the one that resembles a card file drawer, *pictured to the right*). If there are items charged to this patron, the number beneath the icon will be greater than zero. The resulting display will show all items from your library that are charged to this patron. The due dates and item status for each charged item are included in the display.

To search by the item barcode, first select the Item icon on the menu bar. The Search by Item Barcode dialog box displays, and you can enter the item barcode in the labeled box. When the item record opens, click the Charged To icon (*pictured to the right*) to see the patron record to whom this item is charged. The date of the charge transaction and the due date are included in this display,

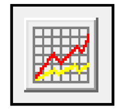
In both the Charged Items index (via the patron record search) and the Item record display (via the item barcode search), the Item Status will display. If there is a plus sign at the end of the text in the Item Status field, this means more than one item status exists for this record.



Item status display highlighted in the Item record; plus sign indicates multiple applied statuses.

If your library chose to migrate item statuses in your bib load, if the same item is also included in the circ load, there may be multiple statuses for the item.

The circ load will assign a status of Charged, Renewed, or Overdue to all items included in the circ load, as appropriate.



To see the complete list of item statuses for a record, you have to search for the item record, and select the Status icon (the one that looks like a graph, *pictured to the right*). When you search by patron record and click the Charged Items icon, there is not a way to see the full list of item statuses for each record; you can only see the full list from the item record as explained above.

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 David.Sellers@exlibrisgroup.com, with a copy to Ishare-team@exlibrisgroup.com.

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

1. Your 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 your circ load problem reports, and also include your 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. This sequential numbering should be followed whether the reports are filed by library staff or by CARLI staff on behalf of your library.

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

   XXX circ report #1
   XXX circ report #2
   XXX circ report #3

   CARLI staff will sometimes file a problem report on behalf of your 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 your library to be numbered sequentially, no matter who submits them.

3. Except for summaries of issues already reported, include only one issue/problem per e-mail note. That makes it easier to determine if Ex Libris has responded to each separate 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 item or patron barcode number.

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 circ load data review procedures, please send those questions to the CARLI Office support@carli.illinois.edu address.

VII. Some Frequently Asked Questions during the Circulation Transaction Load Reviews

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

Question 1:

> When I look at the item status after the circ load, the items that are long overdue are just
> showing as Charged. Why is Voyager not treating this item as Lost? An example is for item
> barcode 31234110003969.

Answer 1:

During the circ load, the only statuses that can be applied are Charged, Renewed (if the circ load extract includes renewal information), or Overdue (if the circ load extract includes a value other than zero in the Overdue Notice field).

CARLI staff run batch circ jobs nightly on the production server for all I-Share libraries. One of those jobs looks at the due date of charged items, and if the appropriate number of days have elapsed (per your library's Circ System Administration values), the circ job will assign statuses of Overdue or Lost--System Applied (as appropriate) to the items.

After your library has approved the PRODUCTION circ load, CARLI staff will add your library to the server scripts that run the nightly batch jobs. Therefore, the day after your library accepts your production circ load, the item status will be updated for the items whose due date, compared to the current date, would qualify as Overdue or Lost—System Applied.

If your library accepts your production circ load before 5 p.m., your library will be added to that night's batch jobs. If your acceptance is received after 5 p.m., your library will be added to the batch job scripts beginning the following evening.

NOTE: during the TEST circ load cycle, these batch jobs are not run.

Question 2:

> We have some items that are included in the circ load that represent Overdue materials. The
> patron already received overdue notices from our old system. How do I prevent the patron from
> receiving a duplicate overdue notice from Voyager for the same item? An example is patron Jane
> Doe, barcode number 212341110237543.

Answer 2:

CARLI staff will add your library to the nightly batch circ jobs that create the circulation-related notices after your production circ load is accepted. CARLI standard practice is to discard the first night's file of notices because we assume the Voyager notices would duplicate notices sent by your former system.

If your library does NOT want CARLI to discard your first batch of circ notices after the production circ load, you must inform CARLI of this decision before you accept the production circ load.

VIII. Accepting the circ transaction load

At the end of the circ load review period, your library's designated contact person must either formally accept or reject the 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> circ load" (where XXX represents your library's 3-letter CARLI code).

If, during the test load, any problem reports filed during the review process resulted in changes agreed to by Ex Libris staff that will be performed during the production load, the acceptance should mention the specific problem report numbers that require changes.

For example, library ABC had 2 problem reports filed during their test circ data review. It turned out that report #1 was a question that was answered, but report #2 was discussed between the library and the Ex Libris Data Analyst, and Ex Libris agreed to fix report #2 for the production circ load. In this scenario, library ABC's acceptance email would look something like the following:

"ABC accepts the test circ load, with the understanding that the issues discussed in report #2 will be fixed in the production circ load."

Hopefully this won't be the case, but if your library must reject the circ 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