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

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.

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 .

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 2 working days (excluding weekends and holidays) to review their 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 libraries are free to begin their 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. 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.

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 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 emailing 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.

NOTE: Due to the fluid nature of circulation data, for the production circulation load, the library may need to update their example records. 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.

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 Circulation client installed on their workstations to do this work.

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.

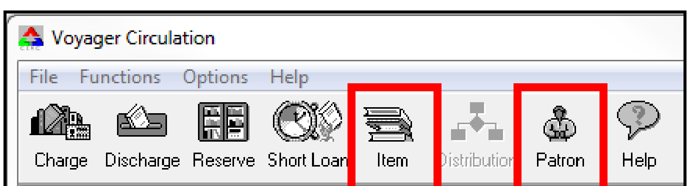
V. Reviewing the data

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

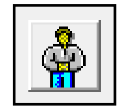


Item icon and Patron icon highlighted in the Voyager Circulation menu bar.

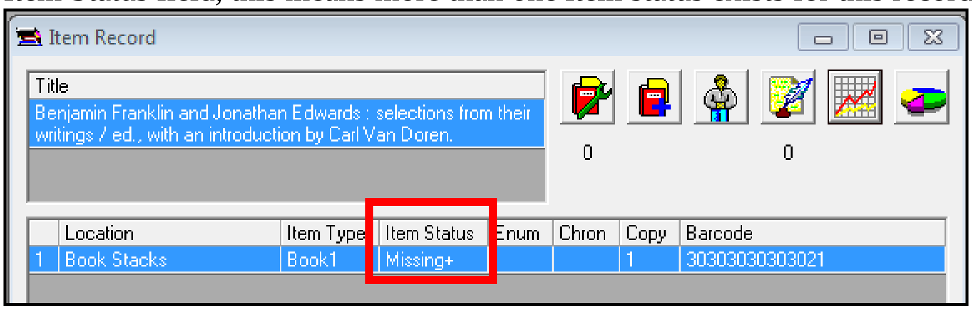
To search for patron records, first click the Patron icon from the menu bar. Then in the Patron Search window, click the radio button next to "Barcode" and type the patron's barcode number into the labeled box. You do not have to enter (or change) any data in the Library field if it appears on this screen.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

Once you have retrieved the patron record, click on the Charged Items 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. Included in the display are the due dates and item status for each charged item.

To search by the item barcode, first click 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 displays, click the Charged To icon (*pictured to the right*) to see the patron record to whom this item is charged. Included in this display are the date of the charge transaction and the due date.

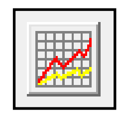


In both the Charged Items index (via the patron record search) and the Item record display (via the item barcode search), the Item Status will display. If there is a plus sign at the end of the text in the Item Status field, this means more than one item status exists for this record.



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

To see the complete list of item statuses for a record, you have to search for the item record, and click 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 see the full list from the item record as explained above.



Some libraries included the migration of some item statuses in their bib load. If the same item is also included in the circ load, there will be multiple statuses for the item, because the circ load will assign a status of Charged (or Renewed, if that information is included in the circ load input file) to all items in the circ load. The other status that can be applied during the circ load is Overdue, which will be set if the circ data extract includes a value greater than zero in the Overdue Notice count field.

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 circ 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. This sequential numbering should be followed whether the reports are filed by library staff or by CARLI staff on behalf of the library.

For example, 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 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 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. 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 the library has approved the PRODUCTION circ load, CARLI staff will add the new library to the server scripts that run the nightly batch jobs. Therefore, the day after the library accepts their production circ load, items whose due date compared to the current date would qualify as Overdue or Lost—System Applied will see those statuses applied.

If the library accepts their production circ load before 5 p.m., the library will be added to that night's batch jobs. If the acceptance is received after 5 p.m., the 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 the new library to the nightly batch circ jobs that create the circulation-related notices after the production circ load is accepted. CARLI standard practice is to discard the first night's file of notices because it is assumed the Voyager notices would duplicate notices sent by the former system.

If the 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.

<u>VIII. Accepting the circ transaction load</u>

At the end of the circ load review period, the 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 the 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 it was 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 the library must reject the circ load, the reason for the rejection must be included in the email note sent to Ex Libris and CARLI.

Getting help

If you have any questions about the content of this document, please contact the CARLI Office at: support@carli.illinois.edu