I-Share Voyager Patron Record Load Data Review Procedures
(CARLI Office June 2013)

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

I. Overview

See the I-Share project timeline for the scheduled date of your library's test and production patron 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 3 working days (excluding weekends and holidays) to review their patron load data. Past experience has been that the notification comes in the afternoon of the day of the patron load task in the project plan. Therefore, the 3-day review period officially begins the day after the patron 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 have created 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 load, the test patron loads will be done on the CARLI test server (voyager-test.carli.illinois.edu), while the production loads will be done on the production server (voyager.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 patron load, the designated contact person must send an email note to the Ex Libris Data Analyst, with a copy to the ishare-team list. Including the list address ensures that all other appropriate Ex Libris and CARLI staff receive a copy of your correspondence.

Data Analyst Russell Thompson's email address is: Russell.Thompson@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, in test and in production. Pre-identifying example records for review will facilitate the data review process.

Staff who will be doing the data review work will need access to your library's final version of the "patron group mapping table" (required if the extracted patron data contain patron group codes from your current system rather than the I-Share patron group codes), as well as any other patron 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 circulation client installed on their workstations for the patron 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/sites/files/i-share/documentation/secure/maninstall_Voyclient.pdf Note that the clients can and should be installed on each appropriate workstation before the data review process begins, but the patron load process actually creates the database, so there is nothing on the server to connect to until Ex Libris staff inform the library that the database is ready for review.

If you do install clients ahead of time, all you have to do to begin the data review process is edit the voyager.ini file on each workstation to point to the correct server/ports, which Ex Libris will supply.

V. Reviewing the data

You will use the circulation client for all of your Voyager patron load data review. You will not need any other staff client during this phase of the data review. You may wish to install all clients at once, however, just to be efficient.

Please do not rely on 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, probably 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 patron records is by the patron's barcode number. 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.

You can, of course, search by other fields in the patron record if you don't have the barcode number handy: these options are patron name or Institution ID.

Searching by patron name is the default option when the Patron Search box appears, and so the Name radio button is checked by default. You can either enter a complete last and first name in the appropriate fields, or you can enter only a last name. You can truncate either the last or first names you enter, but you cannot search for a first name without also entering a last name.

To search by Institution ID, in the Patron Search window, click the radio button next to "Institution ID" and then type the patron's campus/institution ID number in the box. You do not have to enter (or change) any data in the Library field if it appears on this screen.

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 patron 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 patron load problem report emails would use the following subject lines for reports 1-3:

XXX patron report #1
XXX patron report #2
XXX patron 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 issue.

[4] Whenever you report a load problem, you MUST include an example record that demonstrates the problem. When providing an example, always include patron barcode number or other identifying information as well as the Voyager patron 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.

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

VII. Some Frequently Asked Questions During the Patron 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:

> When I look in DRA at patron records, some of them show the items that the patron has Charged
> to them. But their charged items are not showing up in Voyager. Why not? An example is for
> patron barcode 2123456789, with Voyager patron ID 642.

Answer 1:

The charges aren't showing up in Voyager because the circulation transaction loads are being done after the patron load. During the patron load, there should be no entries found if you click on the Charged Items icon.

The only item record statuses that will display during the patron load are those that the library elected to convert during the bib load. 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 2:

> In my patron records, in the "Patron Group" column, I'm only seeing a two-letter code, for
> example "FC." I thought our library was going to use the term "Faculty" for this patron group.
> Did we convert the wrong data to Voyager? An example record is barcode 212343337843,
> Voyager patron ID 926.

Answer 2:

No, the data are not wrong. During the patron load, only the two-character I-Share patron group codes are used. After the library accepts their patron load, then library staff who have responsibility for doing your Voyager System Administration profiling work will translate these codes into more meaningful display patron group names in Voyager. During the patron load data review process, it is only the codes that are supposed to display in the Circ client.

VIII. Accepting the patron record load

At the end of the patron record 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> patron 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 patron 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 patron load. In this scenario, library ABC's acceptance email would look something like the following:

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

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