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# Global Data Change: Overview, Tips and Tricks [2014]

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# Global Data Change: Overview, Tips and Tricks



ELUNA 2014

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# Agenda



- Overview of client
- Retrieve Records, and Create Record Sets
- Data Change Rules
- Preview
- Job Management
- Use cases
- Suggested practices

# Overview



“[A]n integrated solution for making mass data changes to bibliographic, holdings, and authority records within the Voyager database handled through batch processing.”

~ Global Data Change Manuals v.8, 8.2, 9.0

# Overview



- Edits only MARC records in Voyager
- Edits only Bibs, Mfhds, Auths
  - ✦ Not able to edit item records → Pick and Scan
- Very flexible, but use with caution
  - ✦ NOTE: does not consult tag tables, authority files or validate MARC
- Permissions given in SysAdmin


# Basic Workflow



Select records to edit



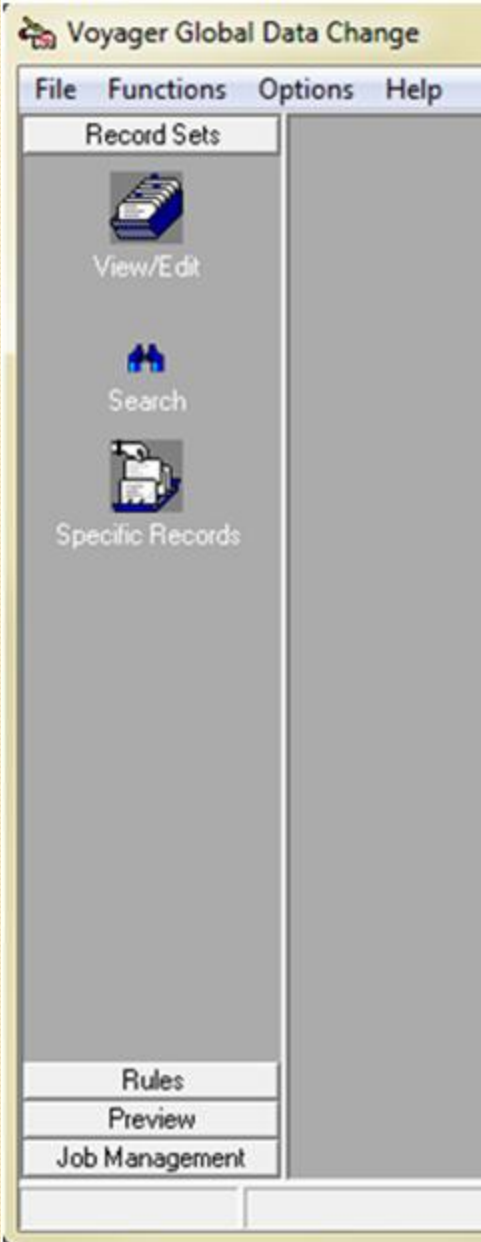
Create rules to apply to selected records



Preview application of rules



Schedule and manage job



# Creating Record Sets



Search

[Bibs]

List of ID number(s)

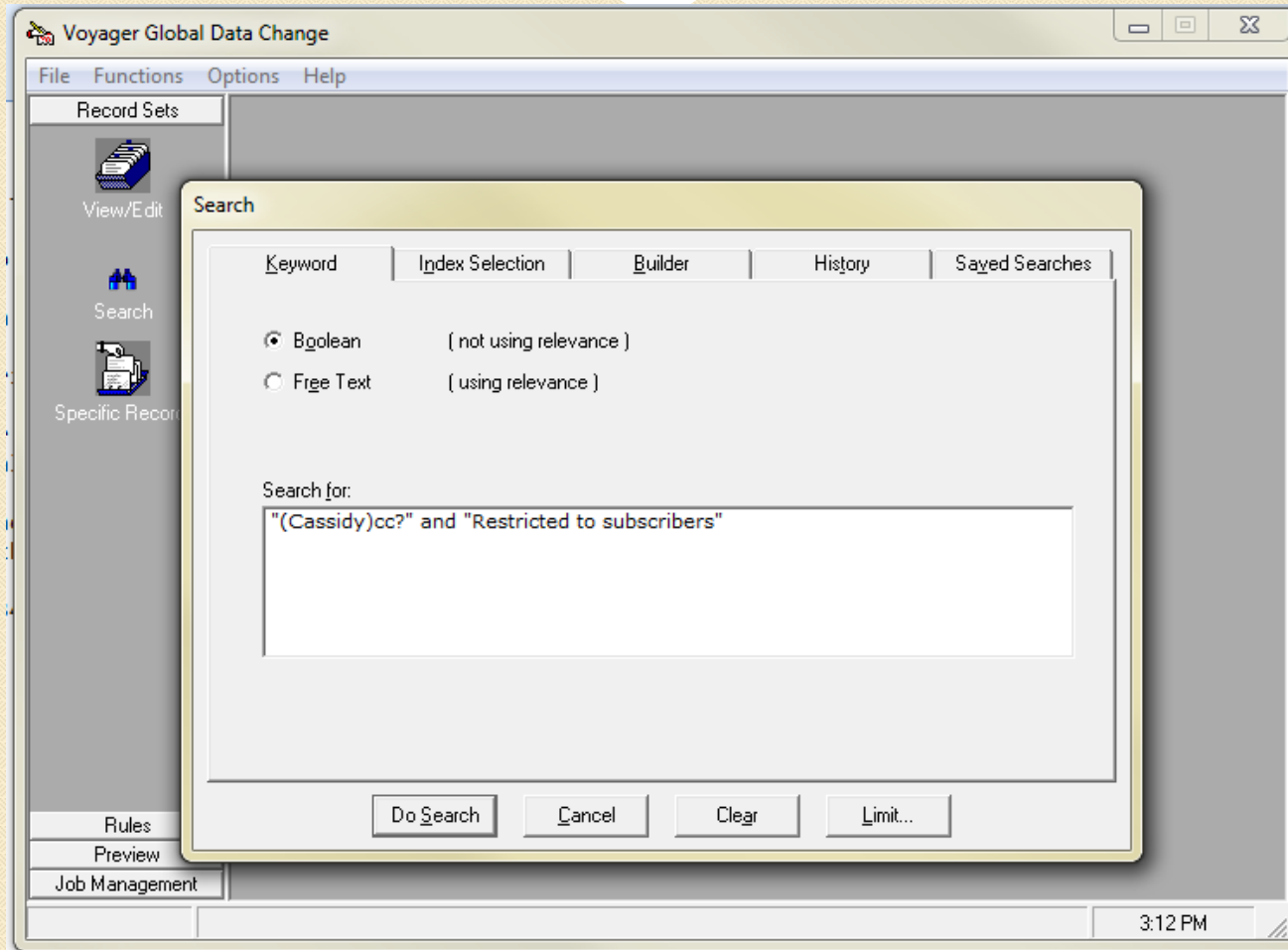
[Bibs, MFHDs, Auths]

Scan rule

[Bibs, MFHDs, Auths]



# Create a record set by searching



Voyager Global Data Change

File Functions Options Help

Record Sets

View/Edit

Titles Index

Font: Verdana Sort By:

Full Title	Author	Date
Bankruptcy law [electronic resource] : claims articles.		2012
Bankruptcy law [electronic resource] : discharge & dischargeability articles.		2012
Bankruptcy law [electronic resource] : practice & proceedings articles.		2012
Bankruptcy law [electronic resource] : reorganization articles.		2012
Federal information disclosure [electronic resource].		2012
Florida state procurement handbook [electronic resource].		2012

Save to New Set | bibs cassidy 506 | Save to Existing Set | Cancel | Search

4687 Records Found Search: Command="(Cassidy)cc?" and "Restricted to subscribers"

Rules  
Preview  
Job Management

3:14 PM

# Creating record sets



Search

[Bibs]

List of ID number(s)

[Bibs, MFHDs, Auths]

Scan rule

[Bibs, MFHDs, Auths]

# Create a record set by known IDs



Voyager Global Data Change

File Functions Options Help

Record Sets

View/Edit

Search

Specific Records

Rules

Preview

Job Management

## Record Sets - Specific Records

Select Record Type:

Record Type: Bib

- Bib
- Mfhd
- Auth

Select Record(s):

Record Id:

Record List:

Select Record Set:

Existing Set:

New Record Set:

Save Cancel

Record Sets: Specific Records 11:16 AM

# Creating record sets



Search

[Bibs]

List of ID number(s)

[Bibs, MFHDs, Auths]

Scan rule

[Bibs, MFHDs, Auths]

# Create a record set by scanning



	A	B	C
1	TAG	TOTAL USES	UNIQUE RECORDS
2	011	3438	3438
3	14	1	1
4	039	53399	53399
5	069	33736	32170
6	073	20	20
7	87	1	1
8	089	9	9
9	91	2	2
10	101	1	1
11	150	1	1
12	212	1491	1381
13	241	35	35
14	265	64594	64589
15	301	6	6
16	302	118	118
17	305	71	71
18	315	2	2
19	320	1	1
20	331	1	1
21	350	3228	3228
22	361	1	1
23	400	2	2

Voyager Global Data Change

File Functions Options Help

Record Sets

Rules

CHANGE

Data Change Rule Sets

SCAN

Scan Rule Sets

Scan Rule Set Groups

Preview

Job Management

Rules: Scan Rule Sets

### Rules - Scan Rule Sets

Name	Description
find bibs with 840	
find bibs with 851	
find bibs with 866	
find bibs with 870	
find bibs with 871, 503, 570, 864, 212, 011, 890, 509	
find bibs with 887, 831, 073, 241, 755, 660, 305 and	

New Edit Delete Import

Edit rule set:

Name: find bibs with 871, 503, 570, 864, 212, 011, 890, 509, 039

Description:

Last Modified: 12/23/2013 Modified By: JulJones

Rule Name	Condition
find bibs 871	When MARC is "871"
find bibs 503	When MARC is "503"
find bibs 570	When MARC is "570"
find bibs 864	When MARC is "864"
find bibs 212	When MARC is "212"
find bibs 011	When MARC is "011"
find bibs 890	When MARC is "890"

Save

### Edit Rule

Name: find bibs 570

Conditions: WHEN MARC is "570"

Add Edit Remove

Consequence:  Include  Exclude

Ok

### Rule Condition Template

Condition: MARC Field / Subfield Exists

Field: 570

Indicator 1: \* (\* = any value)

Indicator 2: \* (\* = any value)

Field Occurrence: [v]

Subfield: [v]

Subfield Occurrence: [v]

Save Cancel

- Record Sets
- Rules
- Preview
- Job Management
  - Submit Scan Job
  - Submit Data Change Job
  - Submit Index Records Job
  - View Job Queue
  - View Running/Completed

## Job Management - Submit Scan Job

### Job Parameters

**J**ob Name:

**R**ule Set Group Name:

**R**ecord Type:

**R**un Job:  Now  Later:

### Scan

Entire Database

Existing Set:

Range of Records:  to:

### Save Records Into

Existing Set:

New Set:

Submit

Cancel



# Example record from scan job



035			‡a (OCoLC)ocm31079759
035			‡9 AGJ8774LM
040			‡a NOC ‡c NOC ‡d OCL ‡d KUK
049			‡a KUKK
090			‡a PS1244 ‡b .C330 1901b
100	1		‡a Cable, George Washington, ‡d 1844-1925.
245	1	4	‡a The cavalier / ‡c by George W. Cable.
350			‡a 1st ed.
260			‡a London : ‡b John Murray, ‡c 1901 ‡e (London : ‡f Hazell, Watson, and Viney)
300	1	0	‡a viii, 371 p. : ‡b music ; ‡c 21 cm.
500			‡a "First edition, October 1901; Reprinted November 1901." --t.p. verso.
570			‡a Murray file copy no. 517.
651		0	‡a United States ‡x History ‡y Civil War, 1861-1865 ‡x Fiction.
909			‡a F C112c ‡z Reclass kg

---

## The cavalier /

**Title:** The cavalier / by George W. Cable.  
**Author:** [Cable, George Washington, 1844-1925.](#)

---

### Holdings Information

**Location:** Young Library - 5th Floor  
**Call Number:** PS1244 .C330 1901b

---

**Publisher:** London : John Murray, 1901  
**Description:** viii, 371 p. : music ; 21 cm.  
**Subjects:** [United States--History--Civil War, 1861-1865--Fiction.](#)  
**Format:** Book  
**Notes:** "First edition, October 1901; Reprinted November 1901." --t.p. verso.

# After implementing data change rule:



## The cavalier /

**Title:** The cavalier / by George W. Cable.  
**Author:** [Cable, George Washington, 1844-1925.](#)

### Holdings Information

**Location:** Young Library - 5th Floor  
**Call Number:** PS1244 .C330 1901b

**Publisher:** London : John Murray, 1901

**Description:** 1st ed.  
viii, 371 p. : music ; 21 cm.

**Subjects:** [United States--History--Civil War, 1861-1865--Fiction.](#)

**Format:** Book

**Notes:** "First edition. October 1901; Reprinted November 1901." --t.p. verso.  
Murray file copy no. 517.

# Creating Record Sets, summary



- **Search** [Bibs]
  - Using any indexed fields, keyword or builder
  - Can save search queries
- **Import list: known IDs** [Bibs, MFHDs, Auths]
  - Import IDs from a text file / add IDs one by one
- **Scan** [Bibs, MFHDs, Auths]
  - Scans database/set/range of records by tag or subfield
  - Uses user-created rules

# Data Change Rules: Conditions



## Can be very broad:

- Owning library = LAW
- Updated by [operator id]
- MARC nXX: 3XX
- MARC nnX: 71X

## Or more specific:

- Create date = yesterday
- Update date = last week
- Specific occurrence of a field / subfield:  
2nd |x in 3rd 650 \_0

# Data Change Rules: Consequences



## Performs these actions:

- Add
- Copy
- Edit
- Delete
- Replace text string with text string\*

\*allows for regex

## On this data:

- Tag
- Indicator
- Field tag
- Subfield contents
- Fixed field

# Creating a data change rule

**Voyager Global Data Change**

File Functions Options Help

Record Sets  
Rules

CHANGE  
Data Change Rule Sets

SCAN  
Scan Rule Sets

Preview  
Job Management

### Rules - Data Change Rule Sets

Name	Description
bibs edit 035 text	for Marcive shipping list records, reformat 035 from "t
bibs edit 264 _4 \$a to be 264 _4 \$c	bibs change 264 _4 \$a to 264 _4 \$c
bibs edit 2nd indicator	change a field's 2nd indicator
<b>bibs edit 506 note</b>	<b>edit 506 note in bibs for Cassidy records</b>
bibs edit 630 to spell out old/new testament	if lp = O.T., spell it out
bibs edit 856 j3	Change "Finding aid at Kentuckiana Digital Library" t

Edit rule set:

**Name:** bibs edit 506 note

**Description:** edit 506 note in bibs for Cassidy records

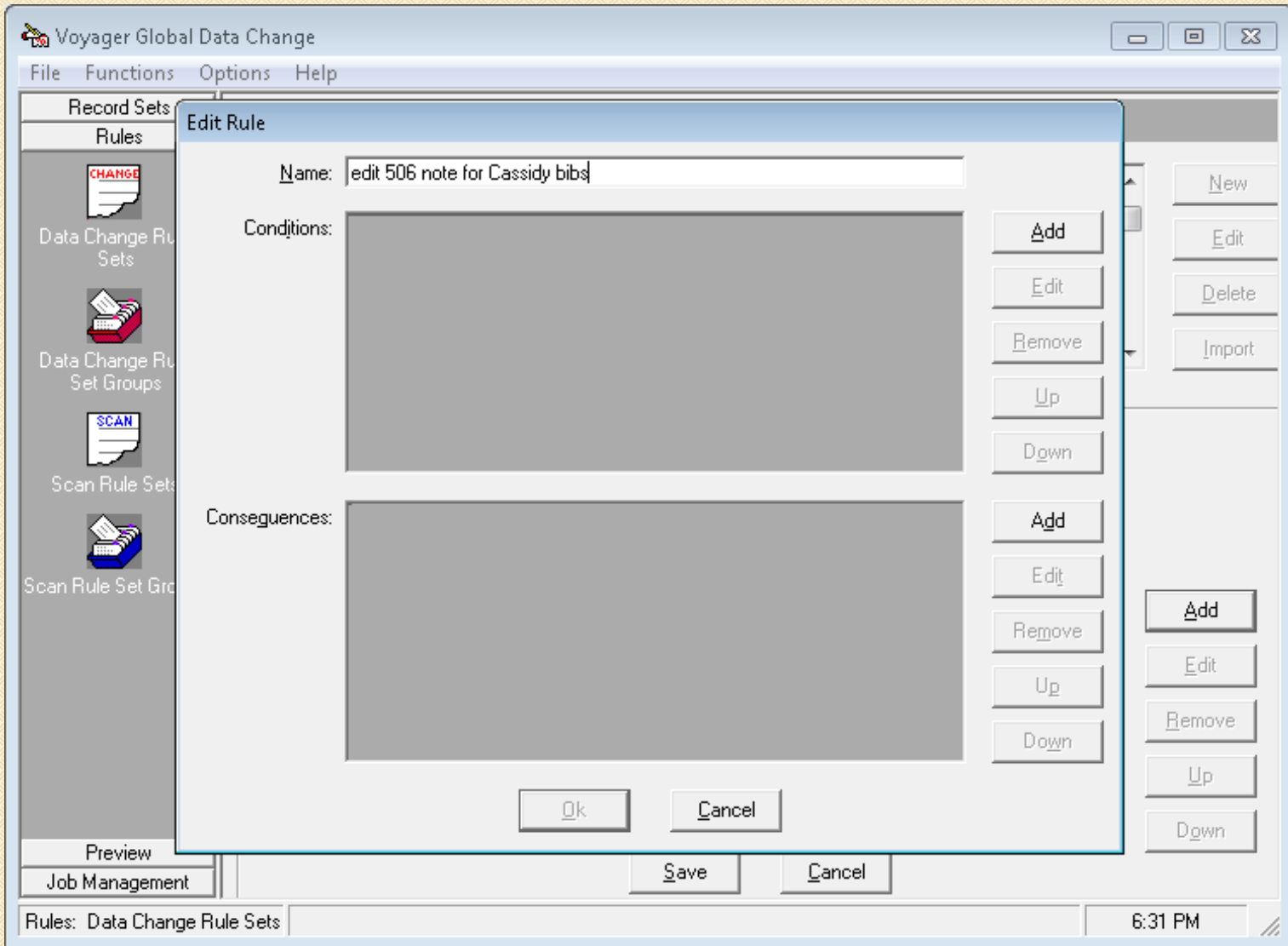
**Last Modified:** 4/23/2014      **Modified By:** JulJones

Rule Name	Condition
-----------	-----------

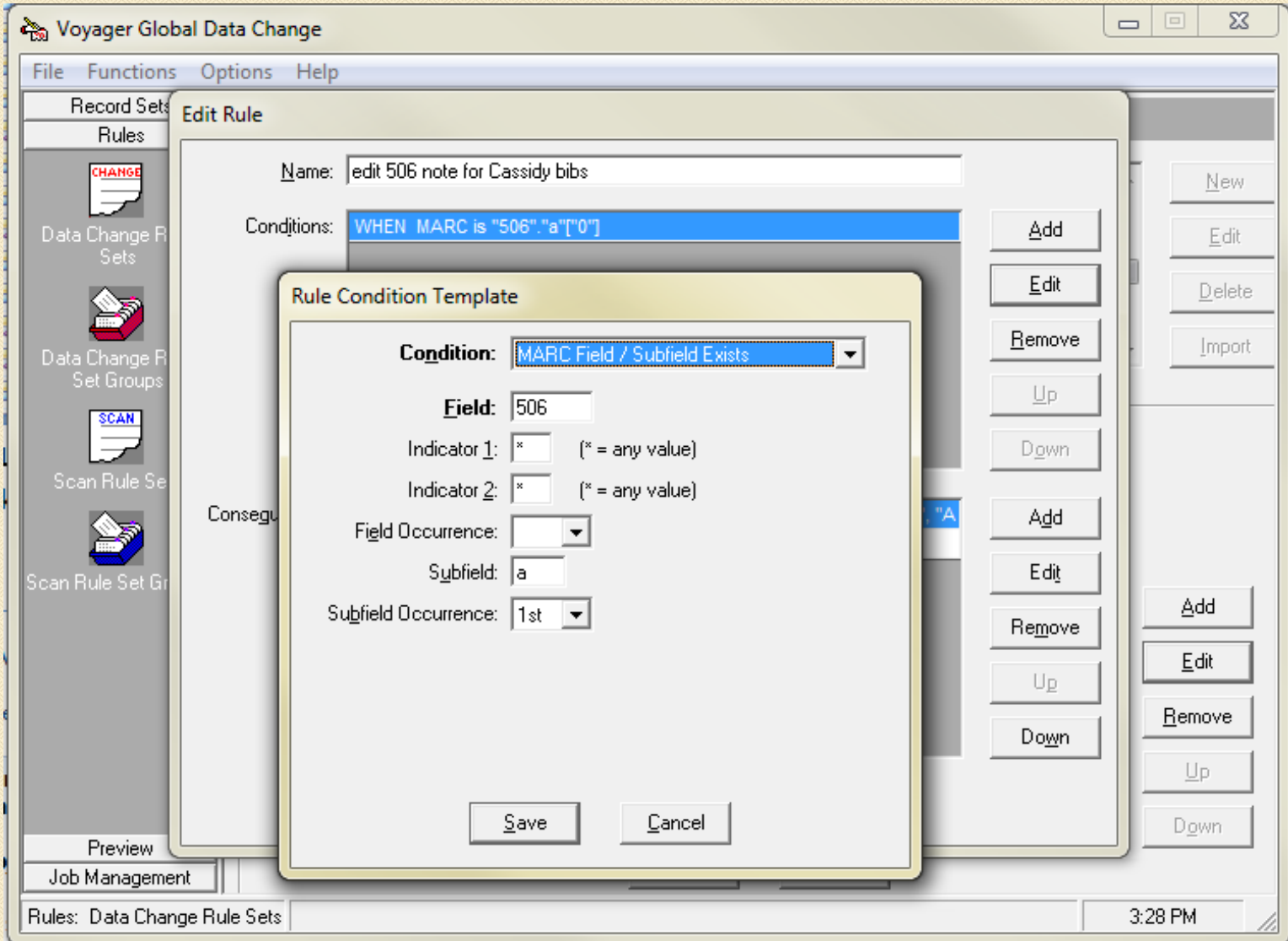
Add  
Edit  
Remove  
Up  
Down

Save      Cancel

Rules: Data Change Rule Sets      9:41 AM







Voyager Global Data Change

File Functions Options Help

Record Sets

Rules

CHANGE  
Data Change Rule Sets

SCAN  
Data Change Rule Set Groups

SCAN  
Scan Rule Sets

SCAN  
Scan Rule Set Groups

Preview

Job Management

Rules: Data Change Rule Sets

Min Max Close

Edit Rule

Name: edit 506 note for Cassidy bibs

Conditions: WHEN MARC is "506". "a"["0"]

- Add
- Edit
- Remove
- Up
- Down
- Add
- Edit
- Remove
- Up
- Down

Rule Condition Template

Condition: MARC Field / Subfield Exists

Field: 506

Indicator 1: \* (\* = any value)

Indicator 2: \* (\* = any value)

Field Occurrence:

Subfield: a

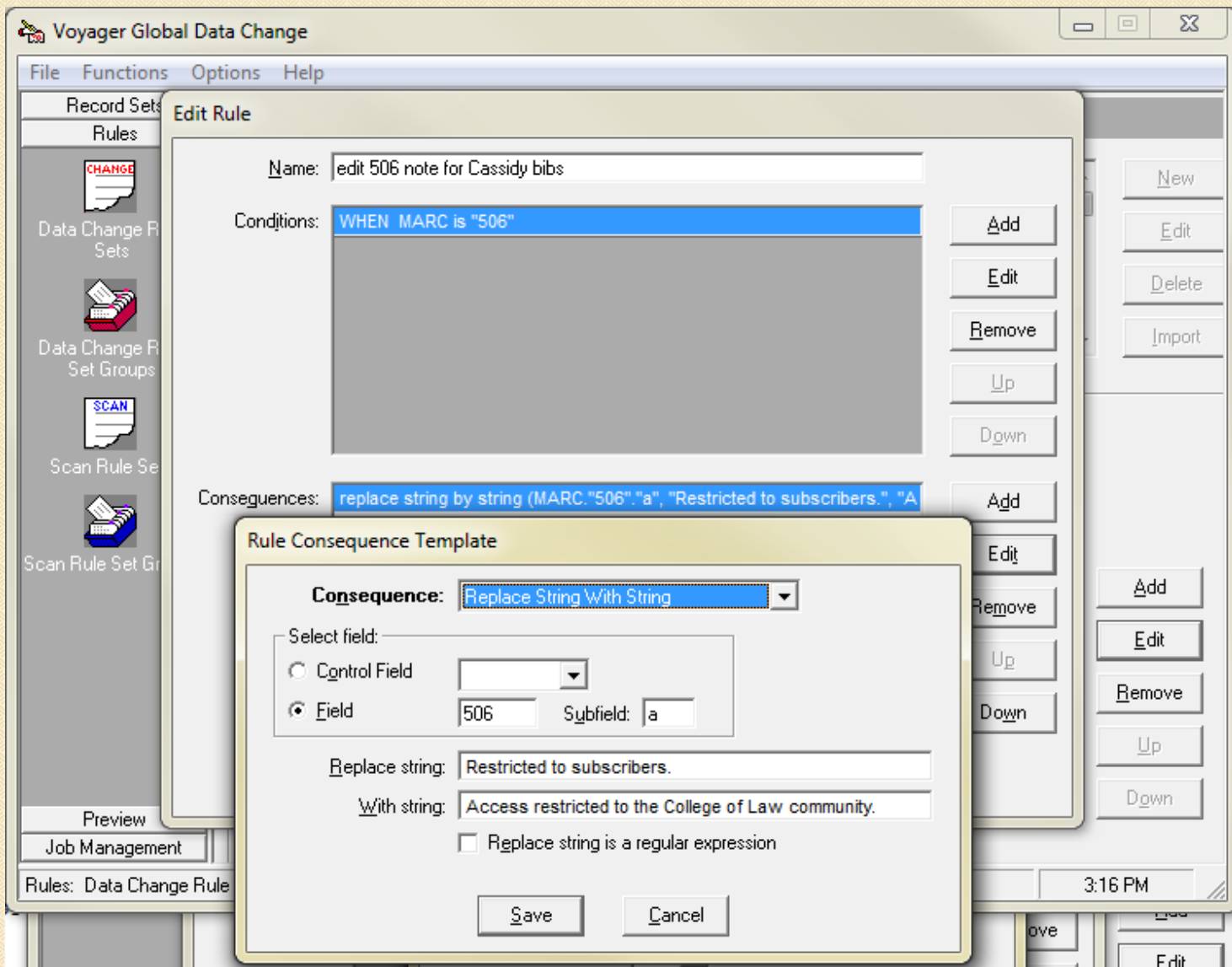
Subfield Occurrence: 1st

Save Cancel

- New
- Edit
- Delete
- Import

- Add
- Edit
- Remove
- Up
- Down

3:28 PM



Voyager Global Data Change

File Functions Options Help

Record Sets  
Rules

CHANGE  
Data Change Rule Sets

Data Change Rule Set Groups

SCAN  
Scan Rule Sets

Scan Rule Set Groups

Preview  
Job Management

### Rules - Data Change Rule Sets

Name	Description
bibs edit 506 note	edit 506 note in bibs for Cassidy records
bibs replace 035 text (Marcive) with (OCoLC)	replace 035 text (Marcive) with (OCoLC)
bibs trial midway ebSCO	
mfhd add standard aserlwpa note	adds aserl archival note to all mfhds
mfhd edit standard aserlwpa note	edit aserlwpa mfhds from "depository" to "archival" c
mfhds change 852 first indicator	change first 852 indicator

New  
Edit  
Delete  
Import

Name: bibs edit 506 note

Description: edit 506 note in bibs for Cassidy records

Last Modified: 4/17/2013 Modified By: JulJones

Set: global RuleResult msgObj  
rule "edit 506 note for Cassidy bibs"  
#priority n  
when  
MARC is "506"."a"["0"]  
then  
set TEMP"1" to MARC."506"."a"  
replace string by string (TEMP"1","WQRestricted to subscribers.", "Access  
restricted to the College of Law community.")  
set MARC."506"."a" to TEMP"1"

Export

Rules: Data Change Rule Sets 7:10 PM

# Add data change rule to group

The screenshot shows the 'Voyager Global Data Change' application window. The main area is titled 'Rules - Data Change Rule Set Groups'. It contains a table with the following data:

Name	Description
bibs delete dup 909s	
bibs ebSCO	trial for midway for ebSCO bibs
bibs edit 035 field	
bibs edit 035 field2	edit parens text in 035
bibs edit 049	changes 049 KUMM to KUKK
bibs edit 506	

Below the table, the 'Edit rule set group:' section shows:

- Name: bibs edit 506
- Description: (empty)
- Last Modified: 4/17/2013
- Modified By: JulJones

At the bottom, there are two lists of rule sets:

- Available Rule Sets:** bibs add 040 lb, bibs add 590 and 909 child dev notes, bibs add 909 if has OCLC#, bibs change 049, bibs change 100 to auth 100, bibs change 110 to auth 110, bibs change 610 to auth 610.
- Rule Sets In Group:** bibs edit 506 note

A tooltip 'Add rule document to rule set' is visible over the right arrow button between the two lists. The 'Save' and 'Cancel' buttons are at the bottom of the dialog. The status bar at the bottom shows 'Rules: Data Change Rule Set Groups' and the time '3:19 PM'.

# Preview



Voyager Global Data Change

File Functions Options Help

Record Sets  
Rules  
Preview

Select Criteria

Job Management

### Preview - Select Criteria

**Record Type:** Bib

Record Source:

Record Id:

Record Set: bibs cassidy 506

**Rule Set Group Name:** bibs edit 506

Preview Cancel

Preview: Select Criteria 3:20 PM

Tag	Ind 1	Ind 2	Data (before rules applied)	Tag	Ind 1	Ind 2	Data (after rules applied)
000			01371cai a2200325 a 4500	000			01395cai a2200325 a 4500
001			3344307	001			3344307
005			20130428182541.0	005			20130428182541.0
006			m f d	006			m f d
007			cr cn nnnauuuu	007			cr cn nnnauuuu
008			091201c20099999nju r w o 0 a2eng d	008			091201c20099999nju r w o 0 a2eng d
035			⌘a (Cassidy)ccn00300712	035			⌘a (Cassidy)ccn00300712
043			⌘a n-us-az	043			⌘a n-us-az
050		4	⌘a KFA2871 ⌘b .A875	050		4	⌘a KFA2871 ⌘b .A875
099			⌘a SEE Internet Access	099			⌘a SEE Internet Access
245	0	0	⌘a Arizona tax agency decisions ⌘h [electronic resource].	245	0	0	⌘a Arizona tax agency decisions ⌘h [electronic resource].
246	1		⌘i LexisNexis identifier: ⌘a AZTXAD	246	1		⌘i LexisNexis identifier: ⌘a AZTXAD
260			⌘a [Newark, N.J.] : ⌘b LexisNexis, ⌘c [2009]-	260			⌘a [Newark, N.J.] : ⌘b LexisNexis, ⌘c [2009]-
310			⌘a Updated regularly	310			⌘a Updated regularly
588			⌘a Description based on source information screen, viewed Dec. 1, 2009.	588			⌘a Description based on source information screen, viewed Dec. 1, 2009.
500			⌘a Coverage: from December 1989 through current.	500			⌘a Coverage: from December 1989 through current.
500			⌘a Decisions from the Arizona Board of Tax Appeals.	500			⌘a Decisions from the Arizona Board of Tax Appeals.
506			⌘a Restricted to subscribers.	506			⌘a Access restricted to the College of Law community.
538			⌘a Mode of access: World Wide Web.	538			⌘a Mode of access: World Wide Web.
650		0	⌘a Taxation ⌘x Law and legislation ⌘z Arizona.	650		0	⌘a Taxation ⌘x Law and legislation ⌘z Arizona.
650		0	⌘a Tax administration and procedure ⌘z Arizona.	650		0	⌘a Tax administration and procedure ⌘z Arizona.
710	1		⌘a Arizona. ⌘b Board of Tax Appeals.	710	1		⌘a Arizona. ⌘b Board of Tax Appeals.
730	0		⌘a LEXIS (Information retrieval system)	730	0		⌘a LEXIS (Information retrieval system)
856	4	0	⌘u http://www.lexis.com/research/xlink?ORIGINATION_CODE=00188&source=352798&search=&autosubmit=yes&searchtype=bool ⌘z CLICK HERE for Internet access to title	856	4	0	⌘u http://www.lexis.com/research/xlink?ORIGINATION_CODE=00188&source=352798&search=&autosubmit=yes&searchtype=bool ⌘z CLICK HERE for Internet access to title
949			⌘a LEXIS ⌘w LC ⌘c 1 ⌘i 300712-2001 ⌘d 12/4/2009 ⌘i LEXIS1 ⌘m vLX ⌘q 2 ⌘r Y ⌘s Y ⌘t WEB ⌘u 12/1/2009 ⌘x ENG ⌘z N-US-AZ	949			⌘a LEXIS ⌘w LC ⌘c 1 ⌘i 300712-2001 ⌘d 12/4/2009 ⌘i LEXIS1 ⌘m vLX ⌘q 2 ⌘r Y ⌘s Y ⌘t WEB ⌘u 12/1/2009 ⌘x ENG ⌘z N-US-AZ
997			⌘a (c)2009 Cassidy Cataloguing Services, Inc.	997			⌘a (c)2009 Cassidy Cataloguing Services, Inc.

Jump ahead:

# Job management

The screenshot shows a software window titled "Voyager Global Data Change" with a menu bar (File, Functions, Options, Help) and a sidebar on the left. The sidebar contains icons and labels for "Submit Scan Job", "Submit Data Change Job", "Submit Index Records Job", "View Job Queue", and "View Running/Completed". The main area is titled "Job Management - Submit Data Change Job" and contains three sections: "Job Parameters", "Update Database", and "Keyword Indexing".

**Job Parameters:**

- Job Name:** bibs edit 506 cassidy
- Record Set Name:** bibs cassidy 506
- Rule Set Group Name:** bibs edit 506
- Run Job:**  Now  Later: 4/17/2013 ... 03:33 PM

**Update Database:**

- Update database
- Do not update database (preview)

**Keyword Indexing:**

- Run records through keyword index (recommended)
- Do not run records through keyword index

Buttons:

Job Management: Submit Data Change Job 10:42 AM

- Record Sets
- Rules
- Preview
- Job Management

-  Submit Scan Job
-  Submit Data Change Job
-  Submit Index Records Job
-  View Job Queue
-  View Running/Completed

## Job Management - View Job Queue

Scheduled	Job Type	Job Name
2013-04-17 15:29:24	Data Change	bibs edit 506 cassidy

- Edit
- Remove
- Refresh

### Job Summary

Job type:	<input type="text" value="Data Change"/>	Scheduled start:	<input type="text" value="2013-04-17 15:29:24"/>
Operator Id:	<input type="text" value="JulJones"/>	Record type:	<input type="text" value="Bibliographic"/>
Record set name:	<input type="text" value="bibs cassidy 506"/>		
Record range start:	<input type="text"/>	Record range end:	<input type="text"/>
Rule set group name:	<input type="text" value="bibs edit 506"/>		
Save record set name:	<input type="text"/>		
Update database flag:	<input checked="" type="checkbox"/>	Keyword index flag:	<input checked="" type="checkbox"/>
Modify date:	<input type="text" value="2013-04-17 15:29:24"/>		



- Record Sets
- Rules
- Preview
- Job Management
  -  Submit Scan Job
  -  Submit Data Change Job
  -  Submit Index Records Job
  -  View Job Queue
  -  View Running/Completed

### Job Management - View Running/Completed

Date / Time	Status	Job Type	Update DB?	Job Name
2013-03-25 10:54:34	Done	Data Change	Y	bibs auth 110 kentucky dept
2013-03-25 13:23:39	Done	Data Change	Y	bibs kentucky dept 110 2
2013-03-25 13:28:42	Done	Data Change	Y	kentucky dept 710 2
2013-03-26 07:25:18	Done	Data Change	Y	bibs auth 710 star dept star 3
2013-03-26 08:31:19	Killed	Data Change	Y	bibs auth 710 star dept star 4
2013-03-27 06:36:20	Done	Data Change	Y	bibs auth 710 star dept star 5
2013-03-27 07:39:51	Done	Data Change	Y	bibs auth 710 star dept star 6
2013-03-27 18:23:17	Done	Data Change	Y	bibs auth 710 star dept star 7
2013-03-28 14:40:44	Done	Data Change	Y	bibs auth 100 henze
2013-04-15 11:22:17	Done	Data Change	Y	aserlwpa dept
2013-04-15 12:53:42	Done	Data Change	Y	bibs 610 us dept of navy
2013-04-17 15:33:18	Running	Data Change	Y	bibs edit 506 cassidy

- Delete Job
- View Log
- Delete Log
- Get Result Files
- Delete Result Files
- Kill Job
- Refresh

#### Job Summary

Job name:	bibs edit 506 cassidy		
Job type:	Data Change	Job status:	Running
Scheduled start:	2013-04-17 15:29:24	Actual start:	2013-04-17 15:33:18
Operator Id:	JuJones	Modify date:	2013-04-17 15:33:18
Records to process:	4687	Records processed:	0
Records deleted:	0	Record error count:	0
Current bulk number:	1	Update database flag:	Y

- Record Sets
- Rules
- Preview
- Job Management

-  Submit Scan Job
-  Submit Data Change Job
-  Submit Index Records Job
-  View Job Queue
-  View Running/Completed

## Job Management - View Running/Completed

Date / Time	Status	Job Type	Update DB?	Job Name
2013-03-25 10:54:34	Done	Data Change	Y	bibs auth 110 kentucky dept
2013-03-25 13:23:39	Done	Data Change	Y	bibs kentucky dept 110 2
2013-03-25 13:28:42	Done	Data Change	Y	kentucky dept 710 2
2013-03-26 07:25:18	Done	Data Change	Y	bibs auth 710 star dept star 3
2013-03-26 08:31:19	Killed	Data Change	Y	bibs auth 710 star dept star 4
2013-03-27 06:36:20	Done	Data Change	Y	bibs auth 710 star dept star 5
2013-03-27 07:39:51	Done	Data Change	Y	bibs auth 710 star dept star 6
2013-03-27 18:23:17	Done	Data Change	Y	bibs auth 710 star dept star 7
2013-03-28 14:40:44	Done	Data Change	Y	bibs auth 100 henze
2013-04-15 11:22:17	Done	Data Change	Y	aserlwpa dept
2013-04-15 12:53:42	Done	Data Change	Y	bibs 610 us dept of navy
2013-04-17 15:33:18	Done	Data Change	Y	bibs edit 506 cassidy

- Delete Job
- View Log
- Delete Log
- Get Result Files
- Delete Result Files
- Kill Job
- Refresh

### Job Summary

Job name:	bibs edit 506 cassidy		
Job type:	Data Change	Job status:	Done
Scheduled start:	2013-04-17 15:29:24	Actual start:	2013-04-17 15:33:18
Operator Id:	JulJones	Modify date:	2013-04-17 16:15:46
Records to process:	4687	Records processed:	4687
Records deleted:	0	Record error count:	0
Current bulk number:	5	Update database flag:	Y

# Frequently used rules



- updating **authorized headings** in bibs (esp. RDA)
- editing **fixed fields**
- editing **bibs** due to OCLC Reclamation project
- removing **obsolete** fields, indicators
- updating, adding or removing **standard notes**
- changing **locations** \*(MFHD only; edit items in P&S)
- editing **call numbers**

# Setting preferences



Session Defaults and Preferences

Workflow | Folders and Files | Colors and Fonts

Rule Set and Preview Font

Name:

Size:   Bold

Preview Highlighting

<input type="text" value="Changed Fields"/>	<input type="text" value="Sample"/>	<input type="text" value="Reset"/>
<input type="text" value="Inserted Fields"/>	<input type="text" value="Sample"/>	<input type="text" value="Reset"/>
<input type="text" value="Deleted Fields"/>	<input type="text" value="Sample"/>	<input type="text" value="Reset"/>

Rule Editor Highlighting

<input type="text" value="Unimplemented Rules"/>	<input type="text" value="Sample"/>	<input type="text" value="Reset"/>
--	-------------------------------------	------------------------------------

OK Cancel

# Suggested practices / tips



- Limit access to client
- Map out where you're going and process step-wise
- Highlight edited / added fields, distinctly
- Preview, preview, preview!
- Data is backed up (in Job Management)

# Suggested practices / tips, continued



- Naming convention for record sets, rules
  - ✦ Add initials and/or date to rule names / descriptions
- Consider timing of scheduling jobs
- Consider server space
- Based on user profile (your ID will show up a lot!)
- Search multiple ways : diacritics, spacing, subfields, etc.

# Further reading



- GDC documentation – EL Commons
  - Appendices, showing examples:  
<http://www.exlibrisgroup.org/display/GDC/Home>

# Any questions/suggestions?



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