GLOBAL DATA CHANGE SUPPORT POLICY

The Global Data Change (GDC) client allows users to make changes to MARC (bibliographic, holdings and authority) records in the Voyager database. GDC's powerful capability must be balanced with appropriate cautions and safeguards. Because of the potential for users to make incorrect changes to mass numbers of MARC records, this policy defines what Ex Libris can and cannot support in regards to the GDC functionality. Ex Libris can provide support for problems caused by errant GDC processes only under these conditions:

Rules were created through the GDC client

The GDC client module permits the exporting and importing of Scan Rule Sets and Data Change Rules, primarily to make it easier for sites to share GDC rules with other libraries. However, it is possible for sites to export rules, edit them manually outside of the GDC client and re-import them into the client. Any changes made by using a rule or rule set created outside of the GDC client cannot be supported; only Scan Rule Sets and Data Change Rules that are created by using the functionality within the client itself are supported. If a problem is discovered after running GDC with an edited Scan Rule Set or Data Change Rule, the only solution offered will be for the site to restore the pre-change records. See Chapter 3 and Chapter 7 of the Global Data Change documentation for more information on exporting and importing rules.

No other changes have been made to the MARC records

As GDC works, it makes a pre-change (marc_before) copy of each selected MARC record as well as a post-change copy (marc_after). If undesirable changes are made, the pre-change records can be reloaded into the system via Bulkimport, overwriting the ones changed by GDC and restoring records to their pre-change condition. If any changes are made to records between the time they are changed by GDC and the time they are restored, the intermediate changes will be lost. There is no workaround for this. Thus, when a GDC update is run, provisions have to be made to ensure that no other changes are made to records from the time the GDC run begins until the results are fully checked. If intermediate changes are made, the site will lose those changes if a restore is necessary.

Files are available

The GDC process creates and updates a number of files on the server. These include log files, but more importantly they include pre-change files of the MARC records and files of deleted records. The ability to restore records to their pre-change condition is completely dependent on these files of records being available. These files can be removed using the GDC client or can be deleted directly from the server. It is very important to save these files until you have verified that the change is correct. See the Global Data Change documentation Chapter 5 for details on these files. See also Chapter 8 for the Troubleshooting details. This Troubleshooting chapter details how to restore via Bulkimport.

If these files have been deleted, there is no way to restore records, and thus no way to recover from undesirable changes made by the GDC process except by performing a full database restore. Such a restore would be your responsibility, although Ex Libris may be able to do it for

you with a fee involved. See Chapter 3 of the Voyager Technical User's Guide for more information on how to restore from backup. Please also note that the database restore would be the entire database, including circulation transactions, acquisitions data etc.

Problems were caused by a software or client bug in GDC

If the GDC process has been run properly, all appropriate checks have been made, and critical files are available to restore records if necessary, but a bug in the GDC process has caused it to make undesirable changes, Ex Libris assumes responsibility for helping a customer recover. The first suggestion will be to restore records to their pre-change condition. If that is not possible for any reason using standard tools, Ex Libris will work with the customer to recover records as much as possible to their pre-change condition.