DALNET BIBLIOGRAPHIC AND HOLDINGS DATA ANALYSIS

PROJECT CHARTER

8/6/97

I. PROJECT SCOPE AND END-PRODUCT

To prepare for system migration, this project will provide DALNET member libraries with an analysis of data used in bibliographic, authority, holdings and item records in NOTIS, DALNET's current online library system.

II. ORIGIN OF PROJECT

Data conversion in system migration is a time-consuming, complex and highly detailed process. On July 15, 1997, a meeting was held with Michael Ping, a Horizon Implementation Project Manager, who advised DALNET to analyze its bibliographic and holdings data now to expedite the conversion. On July 21, 1997, the Director of WSU's Technical Services and Systems, Louise Bugg, appointed a Project Management Team with a Project Consultant to plan and conduct the DALNET bibliographic and holdings data analysis. A Project Implementation Committee will be asked to work with the team beginning August 1997. A document from Michael Ping identifies many (not all) *Notis-specific* codes and fields, and will become a resource to the Project Team and Committee.

III. PRIMARY OBJECTIVES

A. To analyze the bibliographic, holdings, item, and authority data used in both MARC and non-MARC records and fields by DALNET libraries.

B. Recommendations will be offered about any changes in practices and revision of records that should be performed to make the transition less troublesome than would be experienced if database preparation were not performed in advance of system migration.

IV. SECONDARY OBJECTIVES

A. Non-standard practices will be identified which will aid the DALNET Database Standards Committee in its evaluation and revision of existing DALNET Database Standards.

B. Project participants will learn more about their records prior to migration.

C. Sample records will be identified to use for developing and testing the conversion programs.

V. PROJECT DATES

Completion of the data gathering is targeted for November 1997, with data analysis and results prepared in time for the system migration planning expected to occur shortly thereafter. Data analysis and recommendations must be completed by January 1998 or soon after the Horizon contract is signed.

VI. TOTAL COST

Anticipated costs are:

A. DALNET staff, including technical support to run reports and to analyze data.

B. Library staff, who will collect data and sample records.

C. If professional consultation is needed by DALNET from an outside source, the cost for this service should not exceed $1,500 for one day.

VII. KEY CONSTRAINTS/ASSUMPTIONS/CONCERNS

A. The cooperation of DALNET member libraries is assumed with regard to the timely and accurate completion of the survey.

B. There is the possibility that some libraries may not be able to participate in the project and/or may not be aware of non-standard cataloging practices that have been used.

C. It is assumed the QuikReports needed, if any, will work in LMS 6.3.1.

D. Programmers may not have time to write special reports needed to analyze the data.

VIII. KEY PROJECT PERSONNEL

A list of proposed project personnel as of August 6, 1997 follows:

Project Administrator - Louise Bugg, WSU

Project Management Team - Birong Ho, WSU, Adriene Lim, WSU, and
  two other representatives selected from the DALNET Database
  Standards Committee

Project Consultant - Anaclare Evans, WSU

Project Committee - Expanded DALNET Database Standards Committee*

*It is suggested to have DALNET Project Managers expand library representation within the Committee as needed, and for the expanded Committee to increase the frequency of its meetings to perform the activities described in this Charter.

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PROPOSED TASK LIST

8/6/97

PROPOSED METHODOLOGY FOR PROJECT

NOTIS employs U.S. MARC tags, fields, indicators, and subfields, but also uses non-U.S. MARC codes and fields, and non-standard practices in the database. As part of this project, a special survey will be created and sent to all member libraries to determine the ways that libraries are using *Notis-specific* codes and fields, and non-standard procedures. The surveys, along with printouts of sample records, will be analyzed both for variances in cataloging use library-by-library and for common practices within DALNET as a whole (as evidenced, for example, in shared authority files). Recommendations will be made about any advance preparation and revision of records that may be desirable before DALNET migrates to a new online system.

PROPOSED TASKS

Project Administrator, Managers, and Consultant appointed; Project Charter drafted. Specification document received from M. Ping of Ameritech.   July 1997

Project Implementation Committee appointed; Project Charter reviewed and approved by Project Implementation Committee. Project Administrator, Managers, and Consultant devise a portion of a "test survey" (for bibliographical and copy holdings records). The "test survey" is used at WSU.   August 1997

"Test survey" and results are presented to Project Committee for review and approval. Approved "test survey" is used as the foundation with which the Project Management Team will create an actual survey instrument. Survey issued to DALNET libraries.   Sept. 1997

All completed surveys should be received by the first week in November, giving the Project Management Team and the Committee approximately three weeks to tabulate and analyze the data, and arrive at their recommendations.   Nov. 1997

Final analysis and recommendations presented to DALNET management.   Dec. 1997 or Jan. 1998

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