

## DALNET MIGRATION CHECKLIST

Fall 1998

Some staff members at DALNET libraries have asked for a complete checklist of preparatory steps that may be taken now to ease the transition from NOTIS to Horizon. As you will probably notice, some of these steps have appeared in past issues of *DALNET Data*, but all recommended steps are collected here to create a convenient checklist for you to use. Now is the time to clean up errors, update information, and mark for deletion any records not needed in the new Horizon system!

### GENERAL:

- Continue to document changes in practices that may alter the answers given on your institution's Data Analysis Survey (completed in December 1997).
- Review your existing NOTIS locations, sublocations, and their corresponding classification codes, so you can see if any revisions or corrections are required before your data migrates to Horizon. If you need a report showing your existing codes, please contact the DALNET Office and ask for the "Location Count" report.
- Continue to collect between 300-500 NOTIS/LUIS printouts of sample bibliographic and authority records for use in your test database during conversion. (See article in Spring/Summer 1998 *DALNET Data* for more details.) It's best to maintain a list of these record numbers and descriptions in a file that may be converted to ASCII format.
- Keep informed about recommendations issued by DALNET Horizon Migration Task Forces and approved by the DALNET Steering Committee. Recommendations have been approved for MARC maps, standard indexes, naming conventions, borrower types (B-types), item types (I-types), and statistics codes. This information is available on the DALNET website in a password-protected area. To obtain the ID and password, please contact Betty Franks at 313-577-4022 in the DALNET Office.

### ACQUISITIONS RECORDS:

- If your library uses the NOTIS Acquisitions Module and has a long list of fund codes, you may wish to review your existing fund codes now and start devising a list of corresponding seven-character codes that will be used in Horizon. Larger libraries may wish to use the pattern established by UDM, DPL, and WSU, with the following 2/1/3/1 breakdown:

1<sup>st</sup>-2<sup>nd</sup> characters=building or agency

3<sup>rd</sup> character=format\*

4<sup>th</sup>-6<sup>th</sup> characters=discipline or equivalent

7<sup>th</sup> character=at discretion of library.

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\*Designated format codes for 3<sup>rd</sup> character are: 1=monographs/2=standing orders/3=periodicals/4=media/6=electronic resources

Examples are as follows: WSU's Purdy/Kresge discretionary fund for ethnic studies becomes fund code "PK1eth" --- with WSU choosing not to use the last character. UDM's Monographic Budget for English becomes fund code "MC1engb," with UDM using "b" as the last character to mean "Regular Budget."

**BIBLIOGRAPHIC AND AUTHORITY RECORDS:**

- Catch up on backlogged authority work and database corrections so that headings are as consistent as possible. This will help cut down on unnecessary "stubbies" in Horizon. ("Stubbies" are system-generated authority records in Horizon.)

**COPY HOLDINGS RECORDS AND ITEM RECORDS:**

- Review your existing copy statement subfield "k" data, so you can see if any revisions or corrections are needed when you move to Horizon. If you need a report showing these existing codes, please contact the DALNET Office and ask for the "Subfield K" report.
- Review your "I" (In-Process) classification codes on copy statements to see if any corrections are needed. Reports showing "I" class codes may be requested by contacting the DALNET Office.
- Begin to input the call number information on copy statements that duplicate call number information in a preceding copy statement, if this has not already been done. Implicit call-number codes in NOTIS will likely not convert to the new system, so the call number area should **not** be left blank.
- Link as many unlinked item records as possible to avoid unnecessary "fast adds" in Horizon. ("Fast adds" are system-generated bibliographic records that are created when there is no bib record associated with an item record.)
- Mark for deletion all unwanted item records and update any item conditions (e.g. "missing," "lost," etc.) possible. Deleted item records will be purged.

**CIRCULATION:**

- Analyze and review your existing circulation policies for desired revisions (e.g. loan periods, fees, etc.), so that you are prepared to input updated criteria into your new Horizon system. Although it is a lot of work, writing your circulation policies down on paper will be most helpful when you complete your new Horizon tables.

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- Consider reviewing your older outstanding bills and fines to see if any of these can be forgiven in NOTIS. For larger libraries, this may mean designating a certain date before which all bills will be forgiven and noted as such programmatically in NOTIS. For smaller libraries, this may mean forgiving some bills manually in NOTIS. "All Bills" reports may be requested by contacting the DALNET Office.

**COURSE RESERVES:**

- Mark for deletion any unnecessary unlinked item records associated with Course Reserve Statements. These records may be ascertained by obtaining an Unlinked Item Record for your library from the Systems Office.

Please contact Anaclare Evans at 313-577-4002 or via email at [AA4424@wayne.edu](mailto:AA4424@wayne.edu) for any reports you need.