

## **Bibliographic Data Preparation Team**

### **Project Name:**

Bibliographic Data Preparation Team

### **Project Sponsor:**

Alma Implementation Steering Committee

### **Project Description and Purpose:**

The Bibliographic Data Preparation Team will be responsible for reviewing and modifying data in bibliographic records to ensure a smooth transition of data from Sierra to Alma.

### **Project Assumptions:**

Alma offers the opportunity to:

- Significantly improve the user experience
- Automate processes where possible and adapt to Alma workflows
- Review and update/enhance policies and processes
- Consider policy changes due to new workflows

### **Project Scope:**

The Bibliographic Data Preparation Team will review, modify, and remove (where possible) inconsistent Sierra records and codes. This will reduce possible complications during data migration to Alma by reducing the amount of data migrated, as well as removing problem records that are not needed or desirable. It may also simplify data mapping for the implementation team.

### **Project Deliverables:**

*Initial Project Deliverables will include:*

- *Preliminary Project Plan & Milestones*
- *Preliminary schedule/timeline of activities*
- *Define roles (as needed) for team members*

1. Review and clean-up poor and problem MARC/Bibliographic records in Sierra
  - Review of MARC records with no OCLC number in the 001 tag
  - Review of Brief/fly records in Sierra & whether they will/should be migrated
2. Review “problem” coded records and remove is possible
  - Resolve items marked missing/lost/billed & paid
  - Resolve old orders with no attached items
3. Decide whether/what problem records will be migrated if they cannot be fixed, with input from all departments and stakeholders
4. Modify Sierra system codes that are duplicative, inconsistent, or in little use, in consultation with functional teams.
  - Review item, (non-MARC) bibliographic, order, checkin, and patron codes.
  - Review records using little-used system codes and identify whether they could be coded differently.
5. Review and correct or remove unnecessary note and free text fields (pre stamps, notes, etc.)
6. Review and remove unnecessary/problematic X-Linking (Boundwith) functionality.
7. Search for un-barcode items and either add system barcodes or remove records from Sierra prior to migration.

### **Project Milestones:**

- Sierra system codes reviewed
- Inconsistent and problem records data fixed

### **Project Team Leader:**

Melody Condron (UHL)

### **Project Team Members:**

Frederick Young (UHL)

Yesenia Umana (UHL)

Dolores Carmona (UHL)

Susan Ryan (UHL)

Martha Hood (UHCL)

Steven Ring (UHDT)  
Yuxin Li (UH-Law)  
Richard Guajardo (Ex-officio)

**Project Stakeholders:**

- Resource Management
- Circulation/Access Services staff (all libraries)
- Branch library staff (their needs will need to be considered by this team)
- Other library units (all libraries) where fulfillment workflows overlap/impact theirs

**Project Expenses:**

NA

**Project Approval Requirements:**

Alma Implementation Steering Committee  
Migration Team (for configuration option selections)

**Project Start and End Dates:**

November 2018 - July 2019 (allows for continuation past go-live date to address any remaining issues)

**Revision History/Change Control:**

*Note here any substantive changes to this project charter, including names and dates where applicable.*

*Changes to this document or other project parameters should be submitted in writing (paper or email) to the project manager and must be approved by the Alma Steering Committee.*

**Issue Log/Conflict Resolution:**

*For continuous improvement, project leads should capture any process problems in an Issue Log for review by the Alma Steering Committee. Project managers and Steering*

*Committee members are available to assist in resolving conflicts that may arise during project execution.*

**Acknowledgments:**

*Both the project sponsor and the project team leader should acknowledge the contents of the project charter to confirm shared understanding of responsibilities and expectations.*

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Alma Steering Committee,  
1 October 2018

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Melody Condron, PM

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