**Data Cleanup Recommendations: Priorities Checklist**

Some considerations:

* No data cleanup required;
* Consider available resources to perform data clean-up;
* Maximize use of automated solutions;
* Focus on clean-up projects assigned “HIGH” priority.

For data clean-up “Procedures in III,” see [Data Cleanup Recommendations](https://calstate.atlassian.net/wiki/display/ULMS/Data+Cleanup+Recommendations).

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| **Bibliographic, holdings, order and item data** | **Priority** | Notes |
| Consider performing an OCLC reclamation project if you have never done so, or otherwise ensure that your holdings are in sync with OCLC. | HIGH | To ensure library holdings are in sync with WorldCat and insert OCLC record number in 035 field in records missing that field.  See OCLC Reclamation Q&A in ULMS Systems & Development site: <https://calstate.atlassian.net/wiki/pages/viewpage.action?pageId=4587575> |
| Ex Libris requires print and electronic holdings be imported separately. Identify bib records with both print and electronic holdings – these will need to be split during implementation. (P2E) | LOW | Note: No action needed.  *San Marcos: “Ens*ure the bibliographic record numbers that had electronic inventory (records that had 856 41 or 856 40) were on what ExLibris calls the P2E migration form.  The physical item records that are sent in your migrated data will also create inventory attached to the same bib record.”  “If P2E includes bib id, item location will identify if record is electronic. If location is not electronic – item will migrate as physical. If your electronic item has a location that is marked as electronic, then that record will migrate as electronic. Physical item will migrate as physical, and they will both be attached to the same bib.” (Lauren Magnuson, as per Ex Libris) |
| Fix bibliographic records that do not have a 245/title | HIGH | NOTE: 245 fields are required by Alma.  Also check for empty 245 fields |
| Identify links pointing to existing source systems that are migrated, so that they can be removed or updated, if necessary. | MEDIUM | NOTE: These include links to ERM systems that will not transition to the Alma KB and to continuing resources such as locally stored documents or websites which will not be included in the Alma KB. Records with SFX 856 links but no SFX ID will also need to be addressed. |
| Identify and delete duplicate Bibs. | HIGH | NOTE: Headings Report duplicate checks according to the keys set in the Database Maintenance option [**New Bib Record: Duplicate check on fields**](http://csdirect.iii.com/sierrahelp/Content/sadmin/sadmin_options_new_bib_record.html) |
| Identify and re-barcode any duplicate or unintentionally empty item barcodes. | MEDIUM | NOTE: This action applies only for those items that should circulate - Alma allows item records without barcodes to be migrated so having one is not a requirement. Items with duplicate barcodes that are imported into Alma will have the itemid appended to render them unique.  NOTE: Headings Report duplicate checks according to the keys set in the Database Maintenance option **Heading Report: Duplicate use Fields.** Set “b” to enable search for duplicate barcodes |
| Identify and fix duplicate ISSNs | LOW | ISSNs & ISBNs |
| Consolidate multiple holding records for identical item copies for the same location/call number. | MEDIUM | NOTE: By default, Alma creates holding records during load from the Branch and Location values for each item, with the option of also using call no values to discriminate. Consolidation also provides a clearer display in Primo for these resources. |
| Assign a value for empty collection/location for items/holdings, if applicable. | MEDIUM |  |
| Since the NUC/OCLC code is associated at the library-level when publishing to OCLC or Libraries of Australia, if there are different owner codes needed for inventory in the same library, consider separating the inventory to different library owners before implementation. | LOW | NOTE: This is necessary only if your library uses multiple OCLC symbols. This information is used to create the “HELD BY” information when publishing records for export to OCLC. |
| Find serial records without appropriate 2XX fields. | LOW | Possible fields of interest: 222, 240, 245, 246, 260 |
| Clean up chronology and enumeration (item/issue description) for serials, confirming volume/issue data | MEDIUM | NOTE: Errors in these fields will affect sorting of results in Alma and Primo.  For MARC Holdings Format, see <http://loc.gov/marc/holdings/echdhome.html>  Ex Libris is able to migrate holdings information from III check-in records (summary statements constructed from check-in LIB HAS statements). |
| Locate and address item records with a circulating status or location but without barcodes | MEDIUM | NOTE: These records should either have a barcode added in order to circulate or be deleted as "bad" records. May add additional lines to restrict search to item locations that are circulating to avoid adding journal or microform item records, for example. |
| Locate and fix records without “c” tagged call numbers where a call number exists (III libraries) | MEDIUM |  |
| Locate and fix bib records missing 008 fields | MEDIUM | NOTE: In III systems, the 008 field is generated from various fixed-fields during export: See <http://csdirect.iii.com/manual/gmil_lists_specify_criteria_spflds_bib.html> for more details |
| Consider purging withdrawn or missing items | LOW |  |
| Consider purging bib records without attached item/holdings/order records | MEDIUM |  |
| Consider purging brief bib records for items not ordered or upgraded through receiving processes | MEDIUM |  |
| Remove checkin records lacking holding information | LOW |  |
| Resolve items with “in-transit” circ status | MEDIUM |  |

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| **Statuses and Codes** | **Priority** | Notes |
| Standardize statuses and codes to remove extraneous entries and consolidate them into fewer options. Review and reduce purchase order statuses, if this is applicable. | MEDIUM |  |
| Review non-standard MARC fields (alphanumeric, for instance), revising records as appropriate. Note that migration allows mapping to local 9XX fields. | HIGH | NOTE: Recommendations for “local bibliographic extensions” (migration of local bibliographic data) are forthcoming. |
| Review and consolidate material types for items (for example, BK, Book, Monograph) | LOW |  |
| Review and consolidate location codes, patron and item types | MEDIUM |  |

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| **Old/Inconsistent Data** | **Priority** | Notes |
| Clean up and/or purge patron records that are inactive or expired and have no outstanding items, fines, fees, or other transactions. | MEDIUM |  |
| Clean up and/or purge patron records with fines, fees, or other transactions that are older than a certain date and/or less than a certain amount. | MEDIUM |  |
| Clean up and/or remove purchase orders that are old drafts or tests. | LOW |  |
| Clean up and/or remove invoices that are old drafts or tests. | LOW |  |
| Clean up standing orders and subscriptions that are old, should have been closed, or require investigation when active, but have been inactive for years. | LOW |  |
| Clean up or standardize currency codes for vendors, funds, orders, or invoices that are not standard per the ISO standards for currency. | LOW |  |
| Clean up or standardize country codes for patrons or vendors that are not standard per the ISO standards for countries. | LOW |  |
| Locate and fix unnecessary field prestamps | LOW |  |
| Locate and fix diacritic issues in record data | LOW |  |
| Browse call number index to locate and fix bad/incorrect call numbers | MEDIUM |  |
| Browse barcode index to locate and fix bad barcodes | LOW |  |
| Browse numeric indexes (OCLC, LCCN, ISN, etc.) to locate and fix incorrect values | MEDIUM |  |
| Locate and fix bad characters in volume fields | LOW |  |
| Review MARC fields for incorrect subfield tags or indicator usage | LOW |  |

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| **E-Resources and Package Resources** | **Priority** | Notes |
| Mark PDA BIB records clearly so that they can more easily be found in Alma and marked for PDA workflows in Alma and Primo post-migration. | HIGH |  |
| Use KB interface names for electronic interfaces to make use of the Community Zone in the best possible manner. | MEDIUM |  |
| Set up UStat – Customers who do not already use UStat for e-usage statistic reports can set it up prior to Alma and Primo implementation to benefit from its statistics and reporting capabilities from the beginning of Alma and Primo implementation. | MEDIUM |  |

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| **Authority records** | **Priority** | Notes |
| Identify local authority records, if relevant (**keeping in mind the Alma CZ will have various national authorities automatically available globally**). When relevant, these can be loaded post Go-Live using standard Alma loading tools. | LOW |  |
| Find blind and duplicate authority records | LOW |  |
| Find and fix invalid subject headings | LOW |  |
| Locate and fix authority records missing 008 fields | LOW |  |
| Locate and delete authority records lacking data | LOW |  |

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| **Other** | **Priority** | Notes |
| Naming conventions: Standardize how country information is entered such USA, U.S.A., United States, etc. for patron, vendor, and library contact information. | LOW |  |
| Library and collection/location names: Create/ensure unique collection/location names for each library that will be established in Alma and Primo | LOW |  |