**February 8, 2021 – Academic Cataloging Group Notes**

**Attendees:** Amy C. (NDSCS), Shelby H. (UND), Jasmine L. (NDJ), Laurie M. (UND Law), Ben F. (VCSU), Drew (UND), Julia C. (NMI), Tina G. (NDUS), Felecia (UND), Jenny G. (NDSU).

**New Topics:**

* Sandbox refresh: - Ex Libris refreshes the sandboxes twice each year February and August. Refreshes are the Sunday after the Alma release on production environments, February 14.
* 5400 ebook portfolios for Netlibrary ebooks are in the network zone. Which libraries would not like to receive those? Depending on how you feel about these EBSCO/Netlibrary ebooks, let the ODIN office know if you would like them turned off in the network zone or to leave them alone.
* New release – scoping for Physical Inventory Operator to the library. This role can now be scoped to the library so the cataloger could only manage inventory for that library.
* Metadata editor problems – are things getting better? Shelby asked if people still getting permission errors on the new ME. Most are using the old editor. People are using the old ME in both Chrome and Firefox. Shelby points out that the old ME in Chrome is faster and it remembers some of the options she’s made and makes inputting them again easier. Liz will check to see when it will become default. Follow up: March 7 – All metadata functionality will be supported by the new Metadata Editor. The new Metadata Editor is the default. The user can switch to the original Metadata Editor and back. June 6 – New Metadata Editor will be exclusive use.
* Shelby pointed out the new user interface in Alma becomes the default and the old interface is no longer available in March.

**Data Cleanup/Data Review:**

* Authorities – Preferred Terms Correction (info sent to listserv 9/17).
	+ Authorities – preferred term turned on for UND (Shelby) and NDSU (Tina) to review – **UPDATE:** Shelby/Tina update? Subject headings changes. Shelby- authorities functions, but we agreed that editing must be done in OCLC, unless you are editing something only in your institution zone. Tina will send in topic.
* NZ related issues
	+ Shelby had issue with batch changes to record sets – she would bring them in, change in MARCEdit and then reload.-- **UPDATE:** Shelby/Tina update? Shelby has done this now, 170,000 records. Unlink them from the NZ, work on them in MarcEditor, and then load them in via import profile, and link back to NZ. Key is to unlink from the NZ first. Shelby believes it is best to do it in a short period of time. Because other things can be happening in the NZ that would prevent a match. Shelby planned her project out, so she knew what she wanted to do. Then she could pull them out, edit them, and load them back in quickly. Best practice to do it in a timely fashion so network zone changes don’t prevent your records from matching when you load them back in.
	+ Shelby looked into inventory management in the network zone in regard to access to electronic resources among the UND libraries but could also be useful for BSC and NDI students using the same resources.  Shelby has tested this. All libraries would need to work with their vendors to isolate ip ranges. May need a separate meeting to discuss this. A separate meeting to discuss the inventory management for those who want to do it. The idea: Shelby buys an electronic journal title from Wiley, their IP range is 1-4, Med library buys the title and their IP range is 5-8. Ellen has already set up the IP ranges in the Network Zone. When you are working on the portfolio there is a tab you can use to share this title with another library. It would allow access to both IP ranges. Problems with the vendors is what is causing Shelby to hesitate on getting this started. It allows libraries to share resources that they are buying with other libraries.
* Bound with/associated bibs 773 tags for NDSU did not migrate as local to new ALMA instance. ALEPH group they did. -- **UPDATE:** SF case #00900505 created 11/18/20 for ExL to investigate. Ex Libris asked for more information last week. Tina is still investigating, and Shelby thinks at this point just need to work on them.
* 760 standing orders in sets not a protected field by default so could be overlaid unless you use $9LOCAL to make it local. Drew (UND) has future cataloging related to this and will check how things work there. UPDATE: This procedure works to protect the field.
* Updating 035 OCLC numbers when OCLC changes – **UPDATE:**
	+ Liz and Jason changed the import profile back to merge (12/15). Liz has asked libraries to send in examples of when a record does not merge. She has checked the import profile reports and is not able to find any of the reported examples in there. Shelby has given her the OCLC Query files to check. Shelby is concerned that maybe there is a problem because UND created the query with UND’s account. Tina and Laurie suggest that ODIN find out how much it would be to be a member of OCLC.
	+ Shelby can edit when only her library has item - it was a NZ record and appeared to allow the update.
	+ Appears import profile is matching on the “old” OCLC number but not updating it. Has anyone encountered this since last meeting? One of the ALA Core presentations were talking about Alma in sessions, a library was concerned about OCLC control number changes. Shelby has a report with OCLC number changes for her library and she updates records for her library with them. This is a concern for ILL issues and also for batch loading records because we need the records to match on OCLC number.
	+ Best Practice – Should each library do own cleanup or someone appointed/allowed? Should have recommendation after further testing.

**Pending/ Old items:**

* MDE slow in New UI – Reported to ExL in SF#00895869 – **UPDATE**: Developers announced this problem has been fixed and it is scheduled to be part of the February 7, 2021 release (released to sandboxes January 24). Shelby noticed discussion on the Alma listserv that there were permissions problems as well.
* What topics would you like to see covered in documentation, training seminars or next ODIN Work Day? Please submit to odin-acad-cat@listserv.nodak.edu or odinhelp@listserv.nodak.edu **UPDATE:** Ginny is working on Work Day(s) agenda. Tentatively sessions should start in January. Sessions are expected to be 30-60 minutes in length and presented a few in a week. Watch for more details as they are finalized but please send in requests for sessions you would like to see AND volunteer to present sessions you can share!
* Email to list 1/6 there is a problem with the “Link a set of records to the Network Zone” job. When a record matches an NZ record it makes a duplicate record and appears to make the inventory disappear. **Update:** Issue is not resolved yet, SF ticket 920222, we received an update from MNPALS listserv (2/4) that running the “Recalculate Local Resource Types” job after linking causes reindexing that fixes the issue.