**January 6, 2020 – Academic Cataloging Group Notes**

Attending: Amy (NDSCS), Aubrey (Mayville), Ben (NDV), Drew (UND), Erika (UNF), Hattie (BSF), Jasmine (NDJ), Jenny (NDSU), Jolene (NMI), Laurie (UNE), Liz (NBJ), Megan (ODIN), Phyllis Bratton (NDJ), Phyllis Kuno (TBI), Shari (UNW), Staci (NDI), Shelby (UND), Lynn (ODIN)

**Agenda:**

**Catalog User Group Chair election**

Thank you, Jenny, for serving as the Interim Chair for the Cataloging User Group. Shelby offered to chair the group and no objections were raised. Welcome, Shelby.

**Data Cleanup progress**:

* Questions or problems
  + Global changes – can be submitted to ODIN Office for data cleanup if libraries are not comfortable doing their own global changes.
  + Excel sheets were sent out by Megan to all the libraries
    - Question on items without holdings – reserves and ILL – consensus was to not worry about them (cust-32 report). Jenny (NDSU) said there was a report in ALMA that could identify those.
    - Lost items – some will come across during migration. Will that be a problem?
    - Jenny said anything that did not have process type of on loan or available would come across as a different process type as unavailable. NDSU used internal note #3 field for item process status. Technical migration status items had to be cleaned up later. There will be a way to get a list afterwards.
    - Some files had very large output (cust-215 collection list and circ-05 patron list). Megan reran several reports for libraries. The custom reports are can be broken down if you have problems opening them. Let us know if you need any of the reports rerun.
    - Lynn “touched” the files so they appear with the date of 1/6/20.
    - Ret-adm-01 contains items that have material type of “unavailable”
  + Some local fields earlier specified would not be indexed. Jenny revised the spreadsheet so certain fields are included in the indexing. She submitted the completed form on Basecamp to it could be used for dataload.
  + Networked Printers – printouts queue method – try to specify at least one email if you can. Laurie (UNE) remembered Al saying we could wait on the printer pieces.
  + Five location types (fulfillment unit) are people choosing – most libraries are still deciding what would be best for their library.
  + TOU tab column 43 – reloan limit length – is that that max number of loans for particular item?
  + ILL – not sure how to fill out forms – ExLibris said that would be addressed later
  + Reserve and ILL would be two of the exceptions for the Item Policies.
  + Resource Management tab – do anything with barcode generation area? Not much info in the configuration guide instructions.
  + Bring questions to call with ExLibris tomorrow and/or continue to submit to Basecamp.
* People have registered for the training sessions that are starting this week.

**Posted deadlines and to-dos:**

* **Agenda for Tuesday’s call with ExLibris (1/7/20):**
* Configuration form questions?
  + Reminder - DRAFT Alma Config form due Monday 1/13 --- (due to ODIN Office: 1/10 if possible)
* Reminder - Alma Inventory Model and Searching on Thursday 1/9 at 10 CST
  + Sign up here - [📢 2020 Alma Implementation Training](https://3.basecamp.com/3765443/buckets/14394235/messages/2245003943)

**For the week of 1/13**

* Due 1/13: DRAFT Alma Config form due
* Due 1/14: Review Resource Management in NZ training
  + **Collaborative Network Fundamentals:** <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Collaborative_Networks_(Alma_Consortia)/A__Fundamentals>  
    01 Alma Collaborative Networks - Introduction (9 min)  
    02 Shared Bibliographic Records in the Network Zone (9 min)  
    **Consortia Cataloging:** <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Collaborative_Networks_(Alma_Consortia)/C_Cataloging>  
    01 Cataloging Activities in the Network Zone, Part 1: Edit, Copy, and Share (11 min)  
    02 Cataloging Activities in the Network Zone, Part 2: Import Profiles (5 min)
* Reminder - Acquisitions Infrastructure on Tuesday 1/14 at 10 CST
* **Ongoing Tasks**

Post questions to Basecamp

Complete assigned trainings

Sign up for [📢 2020 Alma Implementation Training](https://3.basecamp.com/3765443/buckets/14394235/messages/2245003943)

Work towards Alma and Primo VE certification

[Alma Admin Certification](https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Administration_Certification)

[Primo VE Certification](https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Primo_VE_Administration_Certification/Primo_VE_Certification_-_English)

Archive completed threads in the Message Board

**According to Basecamp To-Dos** **00 - Key Alma-Primo VE Implementation Phase Milestones:**

January 13, 2020 – Alma Test Load Migration Start

January 28, 2020 – Alma Production Environments Delivered for Testing

February 11, 2020 – Primo VE/First Look Production Environment Delivered for Testing

April 10, 2020 -- SIS load testing completed

April 22, 2020 – Authentication Configuration Complete

April 28-30, 2020 – ALMA Onsite Workshop

July 10, 2020 – Technical Freeze

July 3, 2020 – Critical 3rd party integrations completed

July 6, 2020 – Alma & Primo Certification Completed

July 24, 2020 - Fulfillment Freeze

July 12-26, 2020 – Cutover Load

July 29, 2020 – Go Live

\*\* Keep track of any concerns/conflicts with the dates so they can be addressed by the PM team.

**Problem tracking** – Tracking link on ODIN website setup in progress. Will be ready by end of month, possibly by end of next week.

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**Next Meeting:**

**Monday, January 13, 2020 2-3 pm**

Submit any agenda items to [Lynn.Wolf@ndus.edu](mailto:Lynn.Wolf@ndus.edu) (or to this list).

Meeting Connection info:

To join click on the following link:

<https://us.bbcollab.com/guest/90d20ccbea9a407399fd573431fd4372>

**Session dial-in:**   
Call in anonymously. Attendees using this PIN appear as anonymous callers in the session.

|  |  |
| --- | --- |
| •**Dialin:** | 571-392-7650 |
| • **PIN:** | 4111272841 |