**January 21, 2020 – Academic Cataloging Group Notes**

**ATTENDING:** Amy (NDSCS), Aubrey (NMY), Ben (NDV), Drew (UND), Erika (UNF), Jasmine (NDJ), Jason (ODIN), Jenny (NDSU), Julia (NMI), Laurie (UNE), Liz (NBJ), Megan (ODIN), Phyllis Kuno (TBI), Shari (UNW), Staci (NDI), Lynn (ODIN)

**Data Cleanup**:

* Questions? Problems? Updates?
* Configuration forms submitted. Waiting for last two libraries and everything will be done.

**Followup Issues**:

* Some had problems accessing the Resource Management in NZ training – Was this resolved?
  + Answer: Yes, person used feedback option and had access the next day.
* Questions about when they will be able to access the network zone and add users/roles – Megan posted the question to Basecamp for discussion at 1/14’s meeting with ExLibris
  + Answer: ExLibris will advise us when environment is available to access at time of delivery. ODIN Office to determine if libraries will have access to create own users or if that will have to come through the central office for setup in Network Zone. Network Zone would have certain restrictions for editing. Group feels they need a better understanding of how things will work to make some of the decisions.
* Each library will have their own implementation of Alma but the same ExLibris rep.
* What is the timeframe for the decision on how to put records into Network Zone? – Asked in Basecamp
  + To be determined by working group. Options would include Orbis Cascade Method where everything is cataloged in OCLC and then moved into the NZ to be all imported overnight --- or each library works individually. ExLibris is willing to work with us during a functional call to discuss ramifications (typically would happen around April timeframe – after full sweep of training that may affect decisions). There is nothing solid on the schedule right now. Cataloging group to gather more information on different options for further discussion.
* Liz found this link to review in addition to the Orbis Cascade standards --<https://calstate.atlassian.net/wiki/spaces/ULMSS/pages/108560391/Systems+Policies+and+Procedures>
* Who can log in to the institution zone? - Asked in Basecamp
  + Answer: When test load is delivered (expected Feb 3-5), ODIN Office will be notified and provided with a SUPERUSER single login (one for each institution and network zone) to add roles and users. Process to be determined by ODIN Office for who will be allowed to access. Will be providing guidance in setting up users and have data review session. “Anyone who you provide a role/pass/patron for will be able to login to test.”
* There is a migration checklist that Jenny provided to test data during the test load <https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials#Testing_Migrated_Data>

**New Questions/Issues:**

* Username/passwords for test load – will check with ExLibris to verify what is needed.
* When will data be available to review?
  + ExLibris call from 1/14 indicated February 3-5 timeframe.
* Libraries should be looking for policies and procedures on how things might work for the Network Zone options.
* Acquisitions issue -- UND is required to use certain procurement software. “With 4 libraries anticipated to use Acquisitions, two of them will work one way and two will work the other.“ Jenny (NDSU) suggested thinking of the “acq desk” more like “acq department” and can have orders processed through there. She said items can use “Keep in department” until activity is complete and item is ready to be circulated. Work order departments can be set up after the fact.
* When do we hit resource sharing learning?
  + Resource Sharing Models Webinar – Wednesday, January 22nd 10 am.
  + <https://knowledge.exlibrisgroup.com/Alma/Training/Resource_Sharing>
* Additional configuration information was discussed regarding special parameters expanded djs.xlsx spreadsheet. Requested Al/Jason to let libraries know if any other information is needed for this To-Do item.

**Posted deadlines and to-dos:**

**For the week of 1/20**

* Alma Acquisitions Q&A
* Due 1/21: Provide FINAL Alma Configuration form
* Due 1/21: Provide Alma Additional Configuration Information (see task for more info)

**For the week of 1/27**

* Review Alma Fulfillment training
* **Fulfillment:**  
  <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment>  
  01 Working at the Circulation Desk (13 min)  
  02 Physical Item and Move Requests (12 min)  
  03 Course Reserves (13 min)  
  04 Booking Requests (7 min)  
  05 Digitization Requests (10 min)
* **Administration Fundamentals:** <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/G_Administration_Fundamentals>  
  01 Organizational Structure (9 min)  
  02 Circulation Desks (9 min)  
  03 Fulfillment Units (8 min)  
  04 Additional Fulfillment Configurations (8 min)

**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 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. Not ready yet.

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**Next Meeting:**

Monday, January 27, 2020 – Meeting canceled due to ALA.

No meeting until after data load; check out migration checklist on website <https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials#Testing_Migrated_Data>

**Monday, February 3rd 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 |