**February 3, 2020 – Academic Cataloging Group Notes**

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

**Data Cleanup**:

* Questions? Problems? Updates? –
  + Will the data be refreshed before go-live? Yes that is our understanding.
  + Item Process Status – move to note on Item Record – Shelby had asked about acq item notes during one of the Tuesday calls. She had not received an answer yet so asked again on Basecamp.
* Configuration forms submitted.

**Followup Issues**:

* Who can log in to the institution zone? Will be getting SUPERUSER login – should be able roles to the users migrated. Suggest having a list of users and roles that will be needed to expedite the process.
* Discussion needed on Orbis Cascade model for NZ -- Libraries should be looking for policies and procedures on how things might work for the Network Zone options.
  + When does record change from what is being worked on in OCLC? If record is replaced in OCLC, it should replace the NZ record.
  + Generally people felt they wanted to stay cataloging in OCLC and bring in to ALMA. What procedure does NDSU use?
  + Do titles in the CZ that are part of a package belong in NZ? Once activated they will be in the IZ. This will be another area to test thoroughly in the TEST environment.
* When will data be available to review?
  + ExLibris call from 1/14 indicated February 3-5 timeframe.
* When do we hit resource sharing learning?
  + Resource Sharing Models Webinar – Wednesday, January 22nd 10 am.
  + <https://knowledge.exlibrisgroup.com/Alma/Training/Resource_Sharing>
  + Shelby went to ALA and RepeatO was mentioned. ISO part works with Tipasa, ILLiad and integration on OCLC. Things could change between now and go-live.
* 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.
  + Connexion info not provided so will need to add that to configuration when we get into the TEST load.

**New Topics:**

* Premium sandboxes
* Resource sharing models – peer to peer or fulfillment

**Posted deadlines and to-dos:**

**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)
* 2/4 - Watch Alma Tools for Data Review training
  + **Analytics:**  
    <https://knowledge.exlibrisgroup.com/Alma/Training/Analytics>  
    Introduction to Analytics (5-6 min)  
    Reports and Dashboards (20-23 min)  
    Providing Reports to Other Users (10-12) min

**2/4 ExLibris/Library Meeting agenda – note: meeting has been extended to accommodate topic.**

* Using Alma for Data Review presentation

Migration checklist might come in handy <https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials#Testing_Migrated_Data>

**For the week of 2/11**

* Review migrated test load data - submit questions
* Watch Alma Resource Sharing
  + **Introduction to Resource Sharing:**  
    <https://knowledge.exlibrisgroup.com/Alma/Training/Resource_Sharing/A__Introduction_to_Resource_Sharing>  
    01 Resource Sharing Models (4 min)  
    02 Choosing a Resource Sharing Model (4 min)  
    03 Monitoring Resource Sharing Requests (5 min)  
      
    **Peer to Peer Resource Sharing:**  
    <https://knowledge.exlibrisgroup.com/Alma/Training/Resource_Sharing/C_Peer-to-Peer_Resource_Sharing>  
    01 Introduction to Peer-to-Peer Resource Sharing (4 min)  
    02 Patron Requests in Peer-to-Peer Resource Sharing (3 min)  
    03 End-to-End Staff Workflows in Peer-to-Peer Resource Sharing (6 min)  
    04 Institution-Level Configurations for Peer-to-Peer Resource Sharing (7 min)  
    05 Resource Sharing Library Configurations for Peer-to-Peer Resource Sharing (4 min)  
      
    **Fulfillment Networks Resource Sharing:**  
    <https://knowledge.exlibrisgroup.com/Alma/Training/Resource_Sharing/D_Fulfillment_Networks_Resource_Sharing>  
    01 Introduction to Fulfillment Networks Resource Sharing (4 min)  
    02 Walk-In Scenario in a Fulfillment Network (4 min)  
    03 Direct Patron Requests in a Fulfillment Network (4 min)  
    04 End-to-End Staff Workflows for Direct Patron Requests (3 min)  
    05 Tracking Patron Resource Sharing Activities (2 min)  
    06 Configuring a Fulfillment Network (4 min)  
    07 Linking Users in a Fulfillment Network (4 min)
* Reminder - Purchasing Workflows for Physical Resources on Wed. 2/12 at 10 CST
  + Sign up here - [📢 2020 Alma Implementation Training](https://3.basecamp.com/3765443/buckets/14394235/messages/2245003943)

**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:**

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, February 10th 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 |