**February 10, 2020 – Academic Cataloging Group Notes**

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

**Data Cleanup**:

* Rapido – not RepeatO --- correction to notes from last time
* Questions? Problems? Updates? –
  + User Accounts have first and middle names in the first name field.
  + Item Process Status – move to note on Item Record – Shelby had asked about acq item notes during one of the Tuesday calls. Was the question answered during the Tuesday session? They seemed to have moved to the 3rd note as ExL indicated it should.
* Test load has been released to us. Megan distributed credentials. Focus should be on DATA REVIEW.
* Have people been working through the powerpoint testing? Not always clear what is being looked at.
* Shelby looked at some of the ANA links – so far things are looking ok.
* You can browse the call number on electronic resources but they are not displayed.
* Records with many 856s are displaying ok with View It.
* Local URLs from the 856 fields that include the proxy server info seem to not have come across.
* Is the OCLC Connexion configuration setup?
* Shelby having problems with Orders --- not sure if this is permissions or setups? Others report it working ok. Laurie had to ask Pam to help setup hers for vendors and POs.

**Followup Issues**:

* 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? The same --- OCLC and bring to ALMA.
  + 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.

**New Topics:**

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

**Posted deadlines and to-dos:**

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

**For the week of 2/17**

* Review migrated test load data - submit questions
* Reminder - Purchasing Workflows for Electronic Resources on Wed. 2/19 at 10 CST

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

* 2/18: Watch Primo VE training

**Intro to Primo VE:**  
<https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Introduction_to_Primo_VE>  
  
**Getting Started:**  
<https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Intro_to_Primo_VE/Intro_to_Primo_VE_-_English/Getting_Started>  
01 Introduction to Primo (7 min)  
02 What is Discovery and Delivery (7 min)  
03 Primo Central Index (9 min)  
  
**Using Primo:**  
<https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Intro_to_Primo_VE/Intro_to_Primo_VE_-_English/Using_Primo>  
01 Using Primo (22 min)  
02 How Primo Works (24 min)

**PrimoVE for Collaborative Networks:**  
<https://knowledge.exlibrisgroup.com/Primo/Training/Primo_VE_Training/Additional_Primo_VE_Training/Primo_VE_for_Collaborative_Networks>  
Overview and Topologies (6 min)  
Discovery Overview and Configuration (8-10 min)  
  
**Alma Primo Interoperability:**  
<https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/H_Alma-Primo_Interoperability>  
01 Alma and Primo Interoperability Part 1 (17 min)  
02 Alma and Primo Interoperability Part 2 (11 min)

* 2/18 Attend Primo VE hand-off presentation

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 17th -- HOLIDAY -- next meeting February 24th 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 |