**March 2, 2020 – Academic Cataloging Group Notes**

**Data Cleanup**:

* Questions? Problems? Updates? –
  + ALMA data checking progress?
    - **Update:** Working through spreadsheets for evaluation. Most people have had better luck with the Ex Libris spreadsheets than SUNY. We will still need to find a way to quantify what has been checked and what issues are problematic. Only way to look for call numbers on P2E records is to add a holding. Sometimes the local fields are being repeated (example 700 author fields).
  + Primo VE data checking progress?
    - **Update**: Ben from NDV has started testing. Data itself is quite consistent but the linking still has things to check. He has submitted a ticket ODIN. It appears the Primo Scopes did not port over.
    - SUDOC numbers are searching all 086 fields (including the ones that shouldn’t be used), Primo VE combined print record and online on same record. Jenny suggested the dedup and/or frbr might be turned on. Check ALMA Discovery configuration under Other. Look for dedup and frbr test utility. Can enter MMSIDs of two records understand why they are or are not matching.
    - Reminder: Anything for ALMA or Primo VE start with problems in Basecamp. Anything for ALEPH or Primo Classic should be reported through ODIN Help Tickets.
  + Reminder: Problems need to be reported in Basecamp to be evaluated --- sooner rather than later.
  + Several more people have completed ALMA and Primo VE Certification – congratulations!
* Further discussion on NZ model --
  + Shelby was going to contact Orbis Cascade again. **UPDATE**: Pending due to time constraints
  + Titles in the CZ that are part of a package will be in IZ once activated. This will be another area to test thoroughly in the TEST environment. **Update:** Shelby tested this but could not tell if she should be seeing everyone’s activations or just her own. There were two packages listed as UND owning but they did not. These were not in the State Package so not sure what we are supposed to see. Should ask about it in Basecamp but could be related to the reason for the second load.
    - Online resources purchased by state contract have been problematic. **Update**: Some vendors have been using different ISSNs for the title other than the one currently on bib records or in SFX so it does not work. There were issues with the SFX loads so they are redoing those too.
    - Shelby has been working with Ellen on some of these issues.
  + Resource sharing models – Survey results. **Update**: All surveys were turned in and UND/UNE/UNF needs to finish conversation about walk-in patrons. They will need to meet. Peer-to-peer seemed to be the best fit for ODIN in general.
* NBJ had brought up having questions regarding work orders replacing process statuses currently used that was mentioned in Tuesday meeting. ExLibris said they could do a session on that. UND and NMI also expressed interest. Liz will post to Basecamp.

**New Topics:**

* Shelby brought up several issues regarding call numbers. If you have a 050 and 090, it will use the 050 unless you take them out. If you have a 082 and 092, same situation.
* If you have Dewey-like number, it will not do it in cutter order. It will use the whole number instead.
* NDV will be doing more with gov docs this week.

**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>

**Before the meeting on 3/3**

* If you haven't already reviewed the Resource Sharing training that was due on 2/11 (see below), please do:
  + 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)

Tuesday's agenda for Ex Libris Call

* How to complete the Resource Sharing Configuration form

**For the week of 3/10**

* E-resources Acquisitions for Consortia
  + Consortia Acquisitions: <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Collaborative_Networks_(Alma_Consortia)/D_Acquisitions>  
    01 E-Acquisitions Workflows and Management in the Network Zone (12 min)  
    02 Patron-Driven Acquisitions (PDA) Management in the Network Zone (12 min)  
      
    Alma Migration Considerations for Consortia:  
    <https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/010Alma_Migration_Considerations_for_Consortia>
* Reminder - Day-to-Day Patron Services on Wed. 3/11 at 10 CST
  + Sign up here - [📢 2020 Alma Implementation Training](https://3.basecamp.com/3765443/buckets/14394235/messages/2245003943)
* Review migrated test load data - submit questions
* Test Primo VE - submit questions

**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:**

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, March 9th 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 |