**March 9, 2020 – Academic Cataloging Group Notes**

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

**Data Cleanup**:

* Questions? Problems? Updates? –
  + ALMA data checking progress
    - UPDATE: Shelby has been through Cataloging and Acquisitions. Stan doing CIRC – put item on hold but could not check it out.
    - Julia (NMI) – commented that on Primo one of her items said ONLINE when she had online, print and microform. This may be resolved with the second test load. If not, report via Basecamp so it can be investigated.
    - NMY testing on hold trying to get through certification and keep up with weekly meetings.
    - NBJ tried some things and they worked as expected.
    - NDI has not tried editing metadata but would like examples of the process.
    - Browsing call numbers has been a problem. Tables appear to be locked due to reload. Cutters used in 099 tags are problematic. NMI also uses cutters with 092 for their children’s collections.
    - Virtual browse will use 050 instead of 090 – problem listed in Basecamp.
    - Shelby demo’ed how to browse call numbers.
    - Phyllis (TBI) reported she had about 200 patrons that are not hers and she is doing cleanup. They were general shared patron records. Can these be cleaned up after May 15th? Lynn to follow up.
  + Primo VE data checking progress
    - Shelby reported that records seem to be coming across ok. Someone reported that their scopes did not migrate properly.
    - Initial customization will need to be done – Jason and Lynn.
    - Many libraries are still working through ALMA data checking and have not gotten to Primo VE testing yet.
  + Reminder: Continue to report problems in Basecamp.
* Further discussion on NZ model and electronic resources --
  + Shelby was going to contact Orbis Cascade again.
    - Shelby still preparing questions/examples before contacting.
  + Titles in the CZ that are part of a package will be in IZ once activated. Shelby tested 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.
    - This has not been working well for UND. State Package appears to be search only but not accessible for the full text.
* Update on call number situation?
  + - Make sure you are looking at the order of call numbers and browsing.
* Update on Gov Doc testing?
  + - Shelby was able to get import profiles set up and able to get acceptable records coming in. She is “happy” but not “perfectly happy.”
    - Should freely accessible gov docs be available in the NZ? Group in a facet? Deboosted in current Primo so they will not monopolize the search results.

**New Topics:**

* Request for Shelby to demo cataloging next session.
* Will need discussion on cataloging policies and best practices.

**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 3/10**

* 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

**Today's agenda**

* E-resources Acquisitions for Consortia Q&A
* 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)

**For the week of 3/16**

* 3/16: Upload completed Resource Sharing Model form (Consortia\_RS\_Form\_ODIN.xlsx) to the Basecamp folder "Resource Sharing forms - completed" under Docs and Files
* Letters and Notices:
  + [Configuring Letters](https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Administration_Certification/General/General_02%3A_Configuring_Letters) (15 min)
  + [Previewing Letters](https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Administration_Certification/General/General_03%3A_Previewing_Letters) (12 min)
* Reminder - Import Profiles on Wed. 3/18 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

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 16th 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 |