**March 23, 2020 – Academic Cataloging Group Notes**

There was no meeting last week (3/16/20)

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

**Data Cleanup**:

* Questions? Problems? Updates? –
  + ALMA data checking progress
    - Test Load #2 – released late Friday afternoon. Email sent to libraries to start checking again. Please verify problem issues from Test Load #1 are resolved. UPDATE: People were able to get in without problem or if they did Megan reset for them.
    - NMI – on Primo one item said ONLINE when they had online, print and microform. This may be resolved with the second test load. If not, report via Basecamp so it can be investigated.
    - NBJ – previously reported linking issues
    - UND -- browsing call numbers has been a problem. Cutters used in 099 tags are problematic. NMI -- cutters with 092 for their children’s collections.
    - Virtual browse will use 050 instead of 090 – problem listed in Basecamp.
    - TBI -- about 200 patrons that are not theirs and had to do cleanup. They were general shared patron records. Can these be cleaned up after May 15th? Lynn to follow up.

UPDATE: Libraries need more time for review. Shelby will post in Basecamp requesting 2 more weeks.

* + Primo VE data checking progress
    - Should be ready for checking soon.
  + Reminder: Continue to report problems in Basecamp.
* Further discussion on NZ model and electronic resources –
  + Orbis Cascade model – Shelby submitted questions via Basecamp:
    - Help with setting up ODIN for Orbis Cascade-like process. ODIN would FTP files. Question for Ex Libris - do we then need our own import profiles set up also to handle the records or is it done? The next day local fields could be added.
    - Deletes - how will we handle them now that we have a NZ? Alma has settings to prompt for last record - do we need a policy. Do other libraries get files from vendors with deletes? That could by-pass the "last record" notice.

UPDATE: Questions in Basecamp need clarification to work out procedures. Acquisitions and EDI will also play into the decision process.

* + Titles in the CZ that are part of a package will be in IZ once activated. UND could not tell if they should be seeing everyone’s activations or just their own -- two State Packages listed as UND owning but they do not but not sure if that is correct. Verify after Test Load #2.
* Gov Docs – UND was able to get import profiles set up and get acceptable records coming in. 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. UPDATE: Suggest creating a “slot” on Primo VE for Gov Docs that would be available to everyone. UND and NDSU, NDV and NMI (selective repositories) would be among the contributors.

**New Topics:**

* Shelby to demo cataloging. UPDATE: Can edit field but not multiple tags. Cannot copy a group of tags. Demo’ed MD Editor. Edited record. Recommend doing the edits in OCLC before bringing in the records since there are more options and flexibility there as compared to cataloging in ALMA. Authority records seem to be updated much quicker.
* Anyone have files from vendors or somewhere besides OCLC that they are loading?
  + UND and NDSU use MarcEdit to process government document records
  + Others? Films on Demand (NBJ, UNW)? Alexander Street Press (NBJ)? CIS (UNE)?
* EDI or other vendor communication - do others do or want to do? UND will need to set up GOBI & EBSCO
* Any special requests for final load? Can we do that? If so, what do we need?
* 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 3/24**

* View Import Profiles
  + AQ-01 - Import Profiles (9 min)  
    <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/G_Administration_Fundamentals/C_AQ-01_Import_Profiles>  
      
    04 Importing Bibliographic, Inventory and Order Records in Batch (9 min)   
    <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/E_Resource_Management/04_Importing_Bibliographic%2C_Inventory_and_Order_Records_in_Batch>  
      
    Cataloging Activities in the Network Zone (16 min)  
    <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Collaborative_Networks_(Alma_Consortia)/C_Cataloging>
* Since there was a general import profiles session on 3/18, we'd like to customize our 3/24 call to be more ODIN-centric.  Please submit any questions, scenarios, vendors your using for EOD, etc. to the discussion section of this agenda and we will answer/walk through as many as possible.

**Agenda for Tuesday Ex Libris Call:**

* Reminder - Course Reserves on Wed. 3/25 at 10 CST
  + Sign up here - [📢 2020 Alma Implementation Training](https://3.basecamp.com/3765443/buckets/14394235/messages/2245003943)
* Import Profiles Q&A

**For the week of 3/30**

* Course Reserves
  + <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/F_Fulfillment/03_Course_Reserves>  (13 min)  
      
    <https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Course_Reserves>  (1 hour)
* Review migrated test load data - submit questions
* Test Primo VE - submit questions

**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 30th 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 |