**March 30, 2020 – Academic Cataloging Group Notes**

**ATTENDING**: Amy (NDSCS), Aubrey (NMY), Ben (NDV), Drew (UND), Erika (UNF), Ginny (ODIN), Jessica (UNF), Jenny (NDSU), Julia (NMI), Laurie (UNE), Linda (ODIN), Megan (ODIN), Phyllis Bratton, Phyllis Kuno (TBI), Staci (NDI), Lynn (ODIN)

**Data Cleanup**:

* Questions? Problems? Updates? –
  + ALMA data checking progress

Test Load #2 – have these issues been resolved?

NMI – on Primo one item said ONLINE when they had online, print and microform – Julia has not had time to check but still problem for UND.

NBJ – previously reported linking issues – seems to be fixed

UND - browsing call numbers -- still problem

UND - cutters used in 099 tags – still problem

NMI -- cutters with 092 for children’s collections.

Virtual browse use 050 instead of 090 – problem listed in Basecamp.

TBI - about 200 patrons that are not theirs and had to do cleanup. Update: ExL presented a few options for cleanup but appears the process presented earlier may be the easiest. ODIN Office may be able to take care of that for libraries – stay tuned.

**UPDATE:** Libraries need more time for review. Due date moved to April 30.

* + Primo VE data checking progress -- NDSU had to reconfigure scopes – no changes on patron end.

**NMY asked about data source (MARC record) listed in Primo view.**

* + - **Answer: this can be hidden via configuration and label can be changed.**
    - **Facets also can be reordered and altered as needed.**
    - **Each library should start “wish list” for Primo VE display – order of facets, labels, display content, etc. so they are ready when those customizations start.**
  + Reminder: Continue to report problems in Basecamp. Keep problem reports very specific and provide screenshots and examples whenever possible.
* 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. Were these issues all addressed during last Tuesday’s call?

Shelby sent email to listserv summarizing what was placed in Basecamp regarding Orbis-Cascade questions. No objections/additions so Shelby will send to her contact at O-C. Most questions relate to who does what (ODIN vs libraries) and workflow processes.

Shelby also sent instructions for connecting to OCLC and ALMA.

Please review and send feedback to Shelby with results (success/problems).

* + 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. UPDATE: did anyone check electronic resources to see if the SFX activations carried through to create the CZ information and are now reflected in the electronic information in the IZ? Shelby demo’ed electronic collections activation and is process of creating internal document for workflows. Jenny said she could also help with these.
* Gov Docs – 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. Any other info after Tuesday’s call? Do we need more info in this area?

* Any other files from vendors or elsewhere besides OCLC that are being loaded?
  + 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?

**New Topics:**

* Will need discussion on cataloging policies and best practices.
* Mini sessions/demos could be incorporated in the weekly meetings. Topics already mentioned: OCLC process, MetaData Editor, Gov Docs, MARCedit, Bound-with, local fields -- send ideas/requests for sessions to odin-cat list

**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 3/31**

* 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)
* **Since there was a general course reserves session on 3/25, we'd like to customize our 3/31 call to be more ODIN-centric.  Please submit any questions, scenarios, etc. to the discussion section of the agenda on Basecamp and we will answer/walk through as many as possible.**

**Tuesday 3/31 agenda**

* Reminder - No additional training sessions this week
* Review of WebEx chat settings
* Course Reserves Q&A

**For the week of 4/6**

* Review Work Orders
  + Work Orders  
    <https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Alma_Essentials_-_English/E_Resource_Management/05_Work_Orders>  
      
    Managing Requests and Work Orders   
    <https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/Resource_Requests/020Managing_Requests_and_Work_Orders>
* Reminder - Introduction to Analytics on Wed. 4/8 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

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, April 6th 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 |