**April 6, 2020 – Academic Cataloging Group Notes**

**Data Cleanup**:

* Questions? Problems? Updates? –
	+ ALMA data checking status -

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.

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.

**\*\*\* Data review due date moved to April 30**.

* Discussion on email from Shelby on 4/6/20 regarding the Orbis Cascade information –
	+ Orbis Cascade model –
		- Catalog in OCLC. Do any corrections, original cataloging, etc. in OCLC. Records get pulled into the NZ every day via FTP. Next day, add holdings and items, special local fields in IZ.
		- Shelby plans to set up query collection to look for library codes but first needs to check if she can process on behalf of the network or if something needs to be set up at OCLC for an ODIN account.
		- Newest record will be brought in and update the NZ where needed.
		- This will not address batch files of records that are not OCLC records and received from different source. Example of vendors who provide ejournals UND brings in via OCLC: Wiley, JSTOR, Project Muse, ACM Digital Library.
		- Orbis-Cascade page has information on how they handle analinks, bound-with, deletes, as a good start for documenting ODIN workflows. <https://www.orbiscascade.org/technical-services-documentation/>
		- NDSU has some documentation regarding their workflows (but will have to alter a bit due to the addition of the NZ) including bound-with (774 tag) and gov docs.
		- 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.
	+ Second document from Shelby illustrated some ways to alter the patron display (PrimoVE). Options include altering your profile at OCLC or running through a NR routine to remove fields (such as those related to foreign language fields). Since this will affect ALL libraries using the NZ records, this will have to be group decision as to what is in the records. PrimoVE views should be able to be configured to accommodate the different needs among libraries.
	+ 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?
	+ Strategy/workflow for making sure electronic resources and portfolios are showing as they should. If something isn’t right, it should be reported on Basecamp for investigation. Make sure you are looking at your own record and identify the record number (MMSID), screenshot (if possible), description, etc.

**New Topics:**

* Will need discussion on cataloging policies and best practices.
* Update on SIS loader. Work is progressing. Currently working with CND with configuration aspects.
* UND/UNE/UNF working on setting up walk-in borrowing among these libraries. General/Libraries/Relationships is where the fulfillment networks between libraries can be configured.
* Question for when Basecamp will go away – we should have access at least until we switch over to Support after go-live. If we need to stay on longer, we could probably request. Shelby suggests saving items somewhere else for anything you wish to keep just to be safe.
* 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>

**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](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/030Fulfillment/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

**Before the meeting on 4/14**

* Please submit any questions, scenarios, etc. on creating and fulfilling resource sharing requests to the discussion section of this agenda and we will answer/walk through as many as possible.

**Agenda for Ex Libris 4/14 meeting:**

* Reminder -No additional training this week
* Creating and Fulfilling Resource Sharing Requests demonstration
	+ Workflow
	+ Configuration
* Future meeting topic suggestions

**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:**

\*\* SIS load testing ongoing \*\*

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 13th 2-3 pm -** Submit any agenda items to 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 |