**April 13, 2020 – Academic Cataloging Group Notes**

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

**Data Cleanup**:

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

NMI – on Primo one item said ONLINE when they had online, print and microform.

UND - browsing call numbers

UND - cutters used in 099 tags

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:** no updates on above

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

**UPDATE:** NMI – about half done, NBJ – checking eresources, UNE – had problem with workspace, NDJ – lots left to do (homeschool), TBI – worked on list from 2/2 do they still need to do the spreadsheets, NDW – completed and redoing after the reload

* NZ model and electronic resources –
  + Orbis Cascade model workflows
    - <https://www.orbiscascade.org/technical-services-documentation/>

UND has a lot of issues with their resources in the NZ when they are only for UND.

Shelby followed up about the OCLC cataloging and discovered ODIN has login also.

**New Topics:**

* Will need discussion on cataloging policies and best practices.
* ALMA workshop training – April 28-30
  + Define and train on LOCAL workflows using ALMA
  + Demonstration-led discussion
  + Discuss needs, work tasks
  + Cataloging specific sections of agenda:
    - Manual cataloging and record management
      * Post-receiving processing & work orders
      * Metadata Editor: templates, locked records, copy cataloging, form editor, headings, etc.
      * Authority control -
      * Item editor
    - Bulk catalog, inventory, and delivery maintenance
      * Import profiles
      * PDA/DDA (NDSU has one resource ongoing for 2 years)/EBA (evidence based acquisitions)
      * Bulk processing – records, inventory, order lines, users
    - Activating e-resources
* Any additional loading workflows (record sources) that are needed to be covered?
* Cover LOST and MISSING status as part of the training.
* QUESTION: is there a difference between LOST and MISSING in ALMA? Jenny stated the item has to be attached to a patron for the item to be LOST. Missing items in ALEPH have been moved to the Tech Services area of ALMA. If item has any other status than AVAILABLE, it will show NOT AVAILABLE.
* Locally defined bib field indexing – (Liz in Basecamp 4/13/20) – up to 10 bib fields and 10 Holding fields were added to **Holding Details** dimension of the **Physical Items**subject area:

<https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Add_bibliographic_fields_to_Alma_Analytics>

**UPDATE:** since ALMA analytics are unique to each library, they can customize for each. Resource sharing could be an issue in NZ – would ODIN have to do the Analytics there for all libraries?

* Quality of records in the CZ and NZ are a concern. NBJ mentioned FOD and UND mentioned JSTOR/EBA
* Who will be able to update records in the NZ?
* Who will be able to update AUTHORITY records? Shelby is NACO trainer.

**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 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

**For the week of 4/20**

* Primo VE configuration walk-through
  + Please review the following documentation
    - <https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/025Display_Configuration/010Configuring_Discovery_Views_for_Primo_VE>
* 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:**

\*\* 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](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 |