**April 20, 2020 – Academic Cataloging Group Notes**

**ATTENDING**: Amy (NDSCS), Aubrey (NMY), Ben (NDV), Drew (UND), Erika (UNF), Felecia (UND), Jasmine (NDJ), Jason (ODIN), Jenny (NDSU), Jessica (UNF), Julia (NMI), Kelly (NMY), Laurie (UNE), Linda (ODIN), Liz (NBJ), Phyllis (TBI), Shari (UNW), Shelby (UND) 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. This topic is being discussed in the ACAD Fulfillment User Group.

**UPDATE:** ??

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

**UPDATE: ??**

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

UPDATE: ?? UND had issues with their resources in the NZ when only for UND. Ben mentioned that they mainly are there but has not looked at them in detail. \*\*\* will resources purchased by individual libraries be available in NZ to all (they should not be)

* ALMA workshop – Linda sent out email on 4/15/20 and Heather posted to Basecamp 4/16. Questions? Are you ready with workflows and questions?
* **Question:** 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?
* Who will be able to update records in the NZ? \*\*\* might have to discuss in workshop
* Who will be able to update AUTHORITY records? Shelby is NACO trainer.

**New Topics:**

* Will need discussion on cataloging policies and best practices. \*\*\* will need to discuss retention of $2bisacsh
* Request a format similar to Orbis-Cascade for ODIN Cataloging documentation and workflows.
* Shelby walked through the WorldCat Query Collection and showed Collection Manager Daily New Report spreadsheet for the Network Zone loading. This should address the new and changes in the records. Deletes should be done with manual verification since there could be other sources in the 856 tags.
* Aubrey (NMY) noted that there were some significant discrepancies in the searches (taken from the powerpoint) for total records. UND’s MMSID >1 value was basically the same as UND’s Originating System contains keywords ILS. Most have large difference including NBJ (75,000), NDW (200,000), NDSU, NDI (75,000), TBI (5000)
* Do we want to meet April 27th (day before ALMA Workshops begin)? If no agenda items received by Friday at noon, Monday meeting will be canceled.

**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 4/20**

* 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 27th 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 |