**May 4, 2020 – Academic Cataloging Group Notes**

**ATTENDING**: Amy (NDSCS), Aubrey (NMY), Ben (NDV), Drew (UND), Ginny (ODIN), Jasmine (NDJ), Jason (ODIN), Jenny (NDSU), Julia (NMI), Kelly (NMY), Laurie (UNE), Liz (NBJ), Phyllis (TBI), Phyllis Bratton, 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 uses 050 instead of 090 – problem listed in Basecamp.

TBI - about 200 patrons that are not theirs and had to do cleanup. 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:** Was everyone able to complete and submit the review? NBJ, UNW, NMI today, NDJ soon, TBI today, NDV today.

* 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) \*\*\*\*\* set to run in NZ now and appears to be working well.

* + Search external resources -will not need OCLC set up (Shelby’s previous instructions)
* ALMA workshop – Followup questions/discussions
	+ Did you fix all the WKPG, CONV, CONV1, etc collection items? Is tab40 updated?
	+ Any other data cleanup areas you have discovered?
	+ Do 856 tags need to be addressed? Stripped out of NZ records for Overdrive, etc? Example was Zookeeper’s Wife. Need 856 for P2E file for migration and cleanup would be after go-live. Update Portfolio job in ALMA. Aubrey will start a Google Doc to collect titles to be addressed.

<https://docs.google.com/spreadsheets/d/1Vld_AVgMxN78cuGZ1Ez7C1OvgA9UIizeY-VjPE02Nh8/edit#gid=0>

* + NMY BC link: <https://3.basecamp.com/3765443/buckets/14394235/messages/2624056472>
	+ Are any local 7xx fields being used? 760 linking for ordering, 773 for ANA links, 774 for bound-with, 787 used occasionally, 740s for UNE and NDJ, overlay/merge piece – Shelby to ask about in Basecamp

[https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/010Alma\_Online\_Help\_(English)/040Resource\_Management/040Metadata\_Management/130Configuring\_Related\_Records\_for\_Physical\_Inventory#Using\_the\_MARC\_Linking\_Fields\_for\_Related\_Records](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/040Resource_Management/040Metadata_Management/130Configuring_Related_Records_for_Physical_Inventory#Using_the_MARC_Linking_Fields_for_Related_Records)

* + NMI Western Americana microfilm/fiche collection using ups and downs – Shelby and Julia to discuss.
	+ List of tags for local fields -- Post copy and link to CAT User Group area on ODIN site.

<https://docs.google.com/spreadsheets/d/1MkSlkXf0YQSiC8XM3q_uMjzvPlfdZW1nxtmRsynLIis/edit#gid=0>

* + New Metadate Editor installed on Sunday. The 4 minute video Jenny mentioned during the workshop can be found at <https://www.youtube.com/watch?v=LUL_N8FzFIs&feature=youtu.be> with a 17 minute followup video on what’s coming in June: <https://www.youtube.com/watch?v=ka4sfjrf1to>
* **NZ Manager:** Ongoing discussion as to how to handle NZ – who needs access, what type of access, etc
	+ Who will be able to update records in the NZ?
	+ Who will be able to update AUTHORITY records? Shelby is NACO trainer.
	+ Comments are welcome on the listserv.

**New Topics:**

* Shelby reported Children’s fiction call numbers are often not in order (TD12709890/SF00821559). Response from ExL Support: *“We can try to change the current sorting parameter (not visible to the customer) and Full redindexing will be required. If you agree, I will request reindexing permission on your environment. However, it may affect other sorting, not only Other Scheme. Please let me know what you think.”* Discuss.
* Topics to have covered in the Tuesday meetings with Ex Libris.
* NDW – Deletion process in OCLC – if item is in NZ, delete holding and item in your IZ then go to OCLC and delete like you did before. Another question was if the record should be unlinked prior to deleting. Shelby already asked one of her staff members to try and report back.
* Regarding the question in Basecamp about the 710 containing the UND information, Shelby plans to delete the 710s prior to final pull since that information is now in the 953 fields.
* [https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/010Alma\_Online\_Help\_(English)/040Resource\_Management/040Metadata\_Management/180Search\_Indexes/050MARC\_21\_Search\_Indexes](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/040Resource_Management/040Metadata_Management/180Search_Indexes/050MARC_21_Search_Indexes)

**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 5/5**

* Please review the following**:**
	+ **Introduction to Analytics (5 min)**[**https://knowledge.exlibrisgroup.com/Alma/Training/Analytics/01\_Introduction\_to\_Analytics**](https://knowledge.exlibrisgroup.com/Alma/Training/Analytics/01_Introduction_to_Analytics) **Reports and Dashboards (20 min)**[**https://knowledge.exlibrisgroup.com/Alma/Training/Analytics/02\_Reports\_and\_Dashboards**](https://knowledge.exlibrisgroup.com/Alma/Training/Analytics/02_Reports_and_Dashboards) **Providing Reports to Other Users (10 min)**[**https://knowledge.exlibrisgroup.com/Alma/Training/Analytics/03\_Providing\_Reports\_to\_Other\_Users**](https://knowledge.exlibrisgroup.com/Alma/Training/Analytics/03_Providing_Reports_to_Other_Users)

**Tuesday’s agenda**

* Alma Analytics presentation

**For the week of 5/12**

* To Be Determined
* Review migrated test load data - submit questions
* Test Primo VE - submit questions

**Ongoing Tasks**

* Post questions to Basecamp
* Complete assigned trainings
* Future meeting topic suggestions
* 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 \*\*

\*\* Authentication Configuration Completed / Tested? \*\*

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, May 11th 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 |