**May 11, 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), Linda (ODIN), Liz (NBJ), Phyllis (TBI), Phyllis Bratton, Shari (UNW), Shelby (UND) Staci (NDI), Lynn (ODIN)

**Data Cleanup**:

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

NMI - 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 (based on bib record rather than holding) – problem listed in Basecamp.

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

**UPDATE:** Was everyone able to complete and submit the review?

* NZ model and electronic resources –

Orbis Cascade model workflows <https://www.orbiscascade.org/technical-services-documentation/>

**UPDATE:** 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.

* ALMA workshop – Followup questions/discussions
	+ 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](https://docs.google.com/spreadsheets/d/1Vld_AVgMxN78cuGZ1Ez7C1OvgA9UIizeY-VjPE02Nh8/edit%22%20%5Cl%20%22gid%3D0)

NMY BC link: <https://3.basecamp.com/3765443/buckets/14394235/messages/2624056472>

Trying to track different collections/instances for the shared instance so we can capture and test in NZ.

Can categorize on different tabs. Include something other than MMSID since that value will change during go-live

* + 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 posted in Basecamp:

<https://3.basecamp.com/3765443/buckets/14394235/messages/2646730509>

* **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. Update comes through ExL loads
	+ Comments are welcome on the listserv.
	+ \*\* 856 clean-up in the NZ needed after go-live
* 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. **UPDATE**: need cataloger extended role for the user and the extended role to delete invoices (could not get rid of item that was connected to PO line).

**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**. NBJ also sees this for regular OC call numbers. Jenny said they use local for theses and that seems to be working fine. Children’s fiction, gov docs,

AGREED – go ahead with reindex.

* Email to list 5/7 re: NZ Indication Confusion and the 035|a and 035|z. Will this benefit or harm your library? <https://3.basecamp.com/3765443/buckets/14394235/messages/2562301171#__recording_2639245943>

AGREED – can go ahead. Will need to recheck “bibs not linked to NZ & CZ” for cleanup after go-live.

 Link to BC instructions:

 <https://3.basecamp.com/3765443/buckets/14394235/messages/2542759097#__recording_2566740915>

* NMI acq manager
* NMY how does ALMA track statistic of deleted? What action triggers the statistics? Jenny answered you can find that info in analytics for the withdrawn items – lifecycle is the parameter that indicates active or not.

**Before the meeting on 5/12**

* If you haven't already, please fill out the Alma Workshop survey sent on 5/4

 **Agenda for 5/12 call**

* Introduce the Go Live Readiness Checklist
* Review Fulfillment Units and Terms of Use

**For the week of 5/19**

* Continue working through the Go Live Readiness Checklist
* 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
* 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? \*\*

June – prepare final migration forms

Early July – submit final P2E forms

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.

**==============================================================**

**Next Meeting:**

**Monday, May 18th 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 |