**June 15, 2020 – Academic Cataloging Group Notes**

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

**Data Cleanup/Data Review:**

* 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.
* Children’s fiction call numbers are often not in order (TD12709890/SF00821559).

**UPDATE**: Data was reindexed but limited improvement noted for everything except LC. Need examples to followup with ExLibris..

* NZ Manager: Ongoing discussion as to how to handle NZ – who needs access, what type of access, etc
* Shelby created two DRAFT documents for cataloging (sent to odin-cat list on 6/5/20). Documents were reviewed and discussed. Further discussion?

Discussion if when adding a record from NZ if you should push to OCLC – NO. Holdings should be added at OCLC first so the record will not be updated in OCLC.

Client vs web based OCLC – Shelby will adjust the documentation to include web instructions.

**New Topics:**

* No new topics submitted --- what’s on your mind today?
* Requested Jason to run OCLC to ALMA process a few times a week (Monday and Wednesday?).
* Question on deletes from over the weekend - Shelby was investigating how that process works.
* How do we handle duplicates? NDSU had to cleanup duplicates manually. There is a report for duplicate records in your IZ (based on OCLC, ISSN, etc). Under Resources/Advanced Tools/Duplicate Title Analysis.
* What to do with daily list generated for changes? Retained on WMS servers – 90 days but only account holder.
* There is job that will delete bibs in the NZ that have no inventory. \*\* PALS runs a job monthly.
* Import batch of ebooks from EBSCO – should holdings be updated in OCLC?
* If we are sending in P2E forms as part of migration, why isn’t ExL putting these into IZ instead of NZ?

**Before the call on 6/16**

* Submit questions on Normalization Rules to the discussion section of this agenda
* Due 6/15: Return the draft migration form

**Agenda for 6/16 ExLibris Call**

* Normalization Rules

**For the week of 6/22**

* Activating Electronic Resources
* Review Alma configuration - submit questions
* Test Primo VE - submit questions

**Future meetings**

* 6/23 - Activating Electronic Resources
* 6/30 - Scheduled Jobs
* 7/7 - Offline Circulation
* 7/14 - TBD
* 7/21 - Data Review for acceptance

**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.

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**Next Meeting:**

**Monday, June 22nd 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.

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| •**Dialin:** | 571-392-7650 |
| • **PIN:** | 4111272841 |