**June 22, 2020 – Academic Cataloging Group Notes**

**ATTENDING**: Amy (NDSCS), Aubrey (NMY), Ben (NDV), Drew (UND), Erika (UNF), Ginny (ODIN), Jasmine (NDJ), Jason (ODIN), Jenny (NDSU), Julia (NMI), Kelly (NMY), Laurie (UNE), Linda (ODIN), 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: Lynn sent in recording created with Shelby demonstrating the process for clarity on Thursday. Ex Libris to evaluate.
* 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. Last week there was discussion if when adding a record from NZ if you should push to OCLC (NO). Also confirmed holdings should be added at OCLC so the record will come through the OCLC load process.

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

* Any further information/discussion on how deletes/updates are working? Jason mentioned the UPDATES query has run but has not picked anything up. – **UPDATE:** Jason, Shelby and Lynn will meet to walk through process for updates/deletes to see if we can determine where the issue is. Resolved configuration problems and got it working.

Related is posting to Basecamp: <https://3.basecamp.com/3765443/buckets/14394235/messages/2764941029>

Where Pam indicates (we mentioned the report last time – any further thoughts/comments?):  
As a consortia, there should be discussion about protocol for if you are the last institution that has holdings and you are removing them in order to prevent situations where there is an NZ record with no institutional holdings. It would be possible to run reporting to find these "orphans" then use sets to remove in the NZ.

Recommendation – wait to be active for a month or two before deciding to get rid of anything.

* Import batch of ebooks from EBSCO – should holdings be updated in OCLC thereby creating another record in NZ (which is not what we want)?
* Question from Shelby: If we are sending in P2E forms as part of migration, why isn’t ExL putting these into IZ instead of NZ? – did you submit this to Basecamp? Shelby will post in BC.

**New Topics:**

* No new topics submitted --- what’s on your mind today?
* 856 – what are people using? $z is the note, $y $3 is already in portfolio as a note
* Walked through how to handle having two same records that need to be merged in IZ and then sent to NZ.
* Can 852 holding record be automatically be filled in when adding bib record? Yes, if you are sneaky. With a file of records and updating the MD Editor. Something that can be addressed in the future. Tina (NDSU) suggested a template could be used to create holding records.
* Who would we ask to generate a new P2E? I deleted some things and forgot to remove them from the P2E I submitted months ago. – Submit a Helpticket to ODIN Office requesting help generating files.
* Do an ALL TITLES for searching in NZ. Item records can be searched by Physical Title.
* You do not need to edit anywhere in OCLC UNLESS you are going to edit the bib record there.
* Followup to 6/16 ExLibris session on Norm Rules – any comments/questions/discussion?
  + To-Do: Lynn send out fix routines currently in use in ALEPH

**Before the call on 6/23**

* Submit questions on Activating Electronic Resources to the discussion section of this Tuesday call agenda

**Tuesday Call agenda**

* Activating Electronic Resources

**For the week of 6/29**

* 6/29: Submit the following forms/information to ODINHELP:
  + Final Migration Form
  + P2E Form
  + Test Load Retention at Cutover information
* 6/29: Submit the Go-Live Readiness Checklist to Basecamp
* 6/30: Scheduled Jobs
* Review Alma configuration - submit questions
* Test Primo VE - submit questions

**Future meetings**

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

**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 29th 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.

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