Acquisitions Working Group  
April 16, 2018 Meeting

Attending: April Davies, Marianne Foley, Jin Xiu Gou, Kristy Lee, Sarah Maximiek, Leslie Preston, Susanna Van Sant, MaryEllen Donaldson, Kate Latal

• “9XX local field mapping doc”
  Sarah asked group to look at the spreadsheet “9XX local field mapping doc” Metadata Standards and Policies Working Group (SMSP).  
  SMSP proposed how to use and not use the 9XX local fields (Albertin, Cubells, & Iniguez, 2011). 
  Per Kristy: Since the bibliographic records will be shared in PRIMO and since in Alma there will be a network zone tab and an institutional zone tab, decisions are being made about how to use the MARC fields as a consortium, including local fields. The Metadata Standards and Policies Working Group (SMSP) have proposed how to use the During the migration, bibliographic records will match on the OCLC number and holdings will be set on the OCLC master record. Certain fields from the local MARC record will be retained and some will be stripped out. MARC fields 900-949 will be in the network zone, so local data cannot be stored in these fields. Local data must be moved to MARC fields 950-999. 
  The group reviewed the fields Leslie identified as Acquisitions related: 938; 506; 541; 561; ??? and agreed to follow the recommendations proposed. 
  938 Vendor specific ordering data (OCLC) DO NOT USE – Only OCLC will use 938 
  Date in 506 (Local licensing notes) will move to 593 
  Data in 541 (Local acquisitions note) will move to 597 
  Data in 561 (Local ownership note) will move to 598 
  For libraries on the shared servers, a program has already been written to move the data as needed. 
  For libraries that are not on the shared servers, they will need to specify what fields to move the data to before migrating data to Alma. 
  Use of specific MARC fields may change in the future depending on what fields are indexed in Alma. 
  Jin asked about how the data will populate the ERMS. Sarah will review the data from their vanguard load (Binghamton) and report back on how it loaded. 
  There may be other MARC tags in this file that the group needs to address. If anyone identifies any other fields, they will be reviewed at a future meeting. 
  To do: If anyone identifies any other fields in the spreadsheet related to Acquisitions, share them with the group so they can be reviewed at a future meeting.

• Alma Essentials for Acquisitions
  Members of the group confirmed that they all viewed all of the Alma Essentials for Acquisitions.

• Best practices
  Sarah introduced the topic of working on best practices within the network zone; on a system level. 
  She suggested that the group look at shared vendor information in the network zone. 
  Vendor records could be purged, so that they do not migrate unnecessarily. 
  The group discussed what/how will acquisitions data migrate. What each library wants to/needs to migrate is different. For example Binghamton may only need to keep expenditures for the current and previous year while Albany needs at least 7 years. 
  To do: Review the information Sharing Vendor Information in a Network Zone: [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone/06_Acquisitions_in_Consortia/030Sharing_Vendor_Information_in_a_Network_Zone](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone/06_Acquisitions_in_Consortia/030Sharing_Vendor_Information_in_a_Network_Zone) 
  Review vendor records and vendor data. Consider what data should migrate to the network zone.
Jin worked in Georgia; also a state system; did not use Aleph. Jin recommends backing up data that will not be migrated. Access to our legacy system (Aleph) will be limited (perhaps 6 months). Jin will provide contacts for the Project Director and ITS Support Team at Georgia to Kristy. Kristy would like to group members to pose questions to staff at Georgia and have a meeting to discuss them.

Per Kristy, Minnesota PALS (MnPALS) migrated from Aleph to Alma. Per Sarah, their consortia page is a good resource for migration problems and solutions.

This brought up the larger topic of does every library want to migrate their Acquisitions data from Aleph to Alma?

Some libraries are considering starting from scratch in Alma.

Sarah to create a page where the Acquisitions Working Group can post questions and answers for other staff members.

To do: Submit questions about data migration/data back-up to Kristy for Georgia.

• Survey of use of Aleph for acquisitions activities

First survey is to determine if/how libraries are using Acquisitions/Serials Module Aleph for Acquisitions activities; how many using it; what they are using it for; if not using it, determine interested in using Alma for Acquisitions. Sarah to revise working document to separate questions for this survey from questions about workflow, processes, and the network zone. She will draft the survey for next meeting. No questions will be deleted from working document.

Submitted by Kate Latal

References
