Acquisitions Working Group May 21, 2018 Meeting Minutes

Attending: MaryEllen Donathen, Marianne Foley, Katherine Latal, Kristy Lee, Sarah Maximiek, Leslie Preston, Shannon Pritting, Susanna Van Sant

**Kristy asked for feedback on the ERM and Acq in the Network Zone session.**
Kristy advised that the AWG could get a session (training) for our needs at our request.

Vanguards are reviewing their acquisitions data. No formal check list is being used. Reviewing things as they come up. Not seeing a ton of problems with the acquisitions data. No serials check-in. There were problems with the P to E list. Duplications appeared in ways they weren't expected. All Serials Solutions KB data went; they weren't told that would be happening. Vendors were duplicated; vendor data captured from ALEPH and ERM.

Shannon asked to be included in on the discussion with ExLibris about these concerns/questions.

Getting the vanguard data ready has been a fragmented process. Hoping that the vanguard data load helps everyone.

Leslie - No need to follow up; Starting with questions first might have been better because doing the questions at the end of the two hour period was tough. Kristy to share our feedback; maybe just having a Q&A session would have been good, but some questions had already been answered.

Leslie sent out a question about the financial system Sunguard's Bitech used at her campus to the larger Alma-L and did not get a reply. No one seems to be using the same system. Shannon said the issue will be whether someone on your campus can work on the integration with Alma. He also suggested possibility of post-migration integration.

**The group was asked to review the SMSP policy #40: "MSP-40 SUNY Libraries Consortium Metadata Policies, Policy: Loading Brief Order Records: Creating Import Profiles to Load Vendor Order Records into NZ."** It is a workflow best practice. Group requested clarification about whether YBP was simply an example. MaryEllen would like to look at her library's data and test this workflow with their data from Coutts. Kristy will also ask for deadline for review by AWG.

The vanguard training is scheduled for the first week of June. Next AWG meeting is June 4th.

**April and Kate to continue work on minimal use policy.** Shannon shared his view of the difference between a policy and best practice. A policy will have the weight of the SLC behind it. A best practice is when there is not enough consensus; need options/other ways to do things. The way Alma is designed, if you are not doing acquisitions there are other things you cannot do in Alma. The policy needs to set the expectation that it will be used for acquisitions.

Minutes Created by Kate Latal