Acquisitions Working Group September 10, 2018 Meeting Minutes

Attending: April Davies, MaryEllen Donathen, Kate Latal, Kristy Lee, Sarah Maximiek, Susanna Van Sant
(Marianne Foley, Jin Xiu Gou and Leslie Preston could not attend the meeting.)

Minutes: The group took a few minutes to review and edit the minutes from the last two meetings.

Vendors in the NZ: Sarah added three vendors to the NZ (in the vanguard instance). When there are more vendors in the NZ, she will make an announcement on Basecamp and ask vanguards to test copying them to their IZ. A vendor record brought in from the NZ to the IZ will only overwrite a vendor in the IZ if both vendor records have the identical vendor code. The group discussed when it would be appropriate for a library to bring in a vendor record from the NZ. The issues include: option for libraries that have not used Aleph for acquisitions to utilize the vendors in the NZ to populate the vendors in their IZ; should libraries keep two different records for a vendor in their IZ (one from their IZ and one brought in from the NZ); when should a vendor from the NZ be used; should NZ vendors be used for shared acquisitions in the NZ. MaryEllen will work on revising AWG #3: Minimum vendor record information in Alma to incorporate information about this.

Recommendation about fiscal year roll-over before go-live: Kristy asked the group to provide a recommendation about closing out the fiscal year in relation to go-live (early July). Per Sarah, the ExLibris documentation states that you must close out the fiscal year before the cut over. The cut over load will be extracted between June 16th and July 2nd (go-live). The order in which the Aleph data will be extracted from the different SUNY libraries Data is unknown and the data may be loaded from several servers at one time since members of the ExLibris team working on this project are located all over the world. For this reason, the group recommended to close the current fiscal year in Aleph by June 7th. All acquisitions work will come to a halt from June 16th until July 2nd (go-live). Kristy advised the group to share the end of fiscal year deadline as a “drop-dead” date.

Sarah shared that Alma provides the option to set up a way to expend funds remaining at the end of one fiscal year during the next/new fiscal year. This is a configuration option that Sarah will investigate further.

The group continued discussion about developing a data testing/data review checklist. Sarah posted file called Testing suggestions in Alma. There is one tab for each of these areas: analytics, funds, vendor and orders. Kristy shared the testing information from CalState. Testing can be either functional or about migration of data. Sarah to ask each group member to pick a "bucket" to work on. Sarah incorporated identifying reports that acquisitions folks may want to use in Alma into the Testing suggestions in Alma file as the analytics tab.
Kristy encouraged the group to go to **ENUG in October.**

Kristy asked the group to think about what are the most important things to know about acquisitions for new users that could be shared through the **Alma Acquisitions Start-Up Task Force.**

**For next meeting, September 24th:**
Sarah to send out “to dos” and reminders **with some deadlines before next meeting**
Work on data testing/data review checklist and identify reports

Minutes Created by Kate Latal