Acquisitions Working Group September 24, 2018 Meeting Minutes

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

1. Look at the data review spreadsheet ("Testing Suggestions in Alma"). Our goal is to have this out to the LSP today (or, at the absolute latest, by Friday).

Thank you for the additions.

Where will it go?
The SLC LibGuide is for policies. This document is procedures so it will not go on the LibGuide. If we say our checklist is ready, Kristy will bring it to Maggie to integrate ours with a master list of data migration checklists.

Jin suggested a tab for workflows, based on the spreadsheet that she shared with us that described scenarios we might face and will need to be able to do in Alma. We concluded the workflows is a very good training tool, but is not part of post-migration data-checking. We will review the workflow (acquisitions) scenarios more carefully in preparation for our next meeting and consider how to use it for training. We like it!

We have until COB on Thursday for final additions and clean-up to the data migration checklist. Kristy will share the file with Maggie on Friday morning.

2. Review Policy 2 (for small note at the top) and Policy 5 about gifts in Alma acquisitions.

Note in Policy 2 looked good to all of us.

Policy 5 also looked good to all of us and is ready for approval. Kristy will forward it to the Task Force.

3. Policy 3 still needs to be completed; we are missing information on requiring people to use the NZ vendor -- even if a vendor already exists in their local system.

Kristy advises removing mention of the NZ for vendor records. All the policies, uses, permissions, etc. about the NZ are still being considered so we can't really make policies or recommendations about it. Kate will archive the current document and will create a revised version to incorporate these suggestions.
4. Next steps: we need to determine what other basic procedures we need to document. Sarah is working on Invoice Receiving. We will need exercises to go with it.

We will create exercises (and identify volunteers) after we have had a chance to see Sarah's document.


With all the integrations and efficiencies in Alma, and because having IT external to the library can lead to delays in record loads and processing, how should tasks best be shared among different offices within each campus?

These workflows (and server-access, etc.) decisions are campus-based. If there is broad interest, the LSP could weigh in with information or possible suggestions, but these are local decisions, often outside the library's scope. Kristy will check with the LSP task force. Kristy also suggests talking to one's local implementation team and campus dean or campus IT officer.