Continued review of SMSP #41:

Sarah not yet ready for us to review this document again. This document may not be as relevant because of the changes made to the plans for working in the NZ. This will depend, in part, on the work of the new NZ taskforce. Sarah to review this document and look for policy statements within it that could be evaluated now.

Kristy reported that AWG-3 was reviewed and accepted pending addition of a notation/edit/clarification that was recommended:

From Kristy to Everyone: 02:03 PM

https://docs.google.com/document/d/1EFCFclW2vWyUGy7ytoc4m3zXWmB2KrZEAiKIHTtAPLs/edit

Kristy requested the group review the spreadsheet of data testing points for Acquisitions that was created from the work we submitted:

https://docs.google.com/spreadsheets/d/1-SSD8UDkqlydrRUAdEmHL9DG3rhM7RXBC0wlXogRCul/edit?usp=sharing

The deadline for this is 10/25.

There are 18-19 campuses where the Alma instances not complete yet, but some of the campuses that have not used ALEPH for acquisitions so they will not have any acquisitions data in their test load instance of Alma. New acquisitions users will need to create funds and created records to test the system that will be in the system at Go-live and will need to be cleaned-up after cutover load. (This will most likely be true for all of the libraries.)

Group discussed how vendor records are migrating over to Alma. This policy (AWG-3) is specifically for vendors as they are created in Alma and we cannot edit codes in vendor records brought over from ALEPH. If a vendor code needs editing or if a vendor record needs a lot of editing, it was recommended that a library close out the vendor record from ALEPH and then create a new vendor record in Alma. Set old vendor record to inactive and start fresh with a new record. (If the vendor from ALEPH is on any order records, the vendor on the order records would need to be updated.) Sarah to edit this document to explain how this it will be used. Libraries may have some vendor record clean-up to do in Alma. That will be determined during the data review.
Jin asked for clarification about the information that is housed in the vendor records in the NZ. Although this may be an excellent idea for setting policy for vendor records she had a concern that there may be information for each institution that should not be shared in the vendor record in NZ. (Some info may be confidential such as Account numbers). Sarah explained that right now the migration process is only putting vendor records in IZ. If/When we do start to use NZ, only some fields are in NZ and information for the individual library is in the IZ.

The AWG will help libraries to get vendors into their IZ. We will share the spreadsheet of vendors we created that we were going to use to populate the vendors in the NZ. Jin would like to see if a SUNY-wide policy needs to be enforced after libraries get chance to use Alma and practice with it. Sarah to add share a link to about the global vendor information that is housed in the vendor record in the IZ.

The group completed discussion on AWG-3.

Kate shared some information from the Acquisitions/ERM training meeting on Friday (10/19).

Jan Waterhouse, Chair of the Training Working Group, hosted the meeting to share the plans for Acquisitions/ERM training and to get input from the volunteers. It is expected that training will remain “messy.” That there will always be some overlap between Acq/ERM and Cataloging. Sarah is concerned about overlap. Karen Gardner-Athey is on several both groups and may be helping with training. She is coordinating the Fulfillment area. The group would like to identify what else our group can do regarding training.

It was noted that several group members are working on the start-up taskforce and this will be a good test to see how to provide training for people who have not used ALEPH for Acquisitions before and are also learning Alma. The start-up taskforce will be helping with this now and then the training volunteers may be addressing this too.

Jin asked if these these two groups can co-host sessions? Since almost ALL work in Alma begins with Acquisitions. Perhaps the Acquisitions trainers can host sessions for ordering physical items and the Acq/ERM group can co-host sessions about e-resources. It was shared that they heard that some people are confused by the ExLibris training because they are just trying to mimic/or do the work they do in ALEPH in a similar way in Alma instead of learning how to do the things they need to do using Alma workflow. This is how some people are focused now. Shannon would like to see the training coordinated.

Link Sarah shared:

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
The group took a few minutes to look at the Acquisitions data review spreadsheet Kristy shared that was created from the group’s work.

Sarah will be presenting the webinar for data review training on POs, Invoices, and Usage data.

The schedule for the SUNY data review series starting on 10/27 has been posted: https://public.3.basecamp.com/p/LR7L6Q54tsjMatPKFsDdPEf

Where are the policies from all of the working groups? Sarah requested creating a LSP-wide policy page that maps the policy boxes from all of the individual groups. Sarah asked for the creation of a space that concatenates the policies and best practices from all of the working groups that could be fed from the working groups’ pages. It could be called Policies and Best Practices from All Working Groups and have a section/box for each working group. SMSP is working on a workflow chart for metadata.


The group decided to take the information as inspiration and work on a basic workflow for our migration. April volunteered to work on this!

**To do now!**

Let Kristy and Sarah know by Thursday if you have questions/feedback about data review spreadsheet Kristy shared.

Share any specific questions about reviewing data that you would like Sarah to cover in her presentation with Sarah by end of week.

For next meeting....

Review spreadsheet on data review and give feedback to Kristy and Sarah

Sarah to review **SMSP #41 to see if** there any policy pieces in the content that we can pull out and use at this time.

Group to start to discuss use of Reporting Codes. Each group member was asked to read up on this and to share documents they find about this topic.

Minutes Created by Kate Latal