Acquisitions Working Group November 5, 2018 Meeting Minutes

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

Sarah led the meeting. The group briefly discussed some of what they are seeing in their Alma test load. Leslie did not want to migrate their Acq data….. All Acq data that is there goes ….. Per Kristy, Leslie’s data went over, but their vendors are not linked to their POLs because they want to start creating new Acq data from scratch.

Jin reported that they are having an issue with duplicate data, especially patron records. Per Kristy this is related to the multiple campuses that are merging. Kristy recommended that Jin report the problem and see if it can be addressed now or if it will only be able to be addressed as part of cutover.

Jin shared that at Stony Brook they expected 16,000 to have duplicate titles (holdings) between the two campuses, but not duplicate records. One library uses the medical classification and the other did not. They want to keep both classifications…. Not sure how to fix this…..it is a tab in the configuration form that allows for MESH. Kristy does not know the choices selected in this form. Stony Brook asked for local call numbers to be retained. Kristy will ask Ex Libris about this issue next week.

Reporting Codes?
Not a lot of information about Reporting Codes out there. Sarah located all of the docs she could locate and shared them via basecamp. She also reviewed the information available from other consortia and Harvard. They do not have a lot of information out there.

After some discussion, the group decided that since we do not know what the SLC might want the libraries to be able to track and analyze, the reporting codes will be left entirely a local decision at this point in time.

Kristy shared that Orbis Cascade created an analysis of “Encumbrance by reporting code.” This is an example of how the reporting codes can be used. Kristy asked if it might be worth it to experiment with these codes? Select two or three campuses, agree on a set of reporting codes and just do some dummy orders to see if we can run it through the NZ? Sarah reached out to the chair of the Analytics Working Group about reporting codes and has not yet heard back. Kristy will bring this up to the Analytics Working Group to see if they are interested in working on this topic. Kristy sees the potential value in using Reporting Codes. AWG group members from Binghamton, Albany and Buffalo are willing to work on this as a test.

Policy review of AWG 4 Best Practices: Using EOCR/EOD in the Network Zone
Sarah created a new document to use in place of the SMSP 40 document. The screen shots were from the previous Alma UI. Sarah asked the group to review the introduction of the document.

Suggested changes to this document ….

**MaryEllen??** asked to clarify what type of records this document is about (bib and order records). Jin asked about how brief bib records will be handled. Per Sarah, when records are loaded, if there is not a match in the NZ, then the bib record would be pushed up to the network zone.

This is not assuming that every order record will be created by EOD. This document will be shared with some other working groups before sharing it with the SLC.

The lack of familiarity with the system leaves a lot of questions about how any of this should be managed. Ultimately this is all work being done at the local level. A bib record has to meet certain minimum standards in order for the record to be loaded into the NZ. This is to help make sure that records are placed in the NZ and not just in your IZ.

Most of us are not currently doing this work in ALEPH; it is new to us. Per Jin, Stony Brook has been doing EOCR for many years. Sarah will share the document with the group after getting feedback from Jennifer Smathers (SMSP).

**Presenting at the Alma Workshop in December in Syracuse.**

Ex Libris wants Chairs to present and do small group meetings at the December training in Syracuse. Per Shannon, Ex Libris wants to use the in person training time to get clarification on how SUNY will be using Alma and what is expected from each library. Kate is attending, but not willing to take on something else. Others are attending, but not interested in presenting. Kristy recommended that every campus have representation at the training; being in person will help with discussion/feedback. Per Shannon, it is difficult to provide the same level of experience that you get in person via online because it is interactive. If it is not required than it may be difficult to get funding to attend this training.

**G3 Alma Institutional Workflow Scenarios**

Jin shared the original document with us. April reformatted the content as a text document and edited it a bit. Sarah asked if it is ready to post? Jin suggested that we stick to the Acquisitions scenarios and remove the others. Sarah is going to take another pass to see what could be removed if we only stick to the Acquisitions scenarios and reshare the document.

**Next meeting scheduled for November 19th. Let Sarah know if you cannot meet that week.**

**Jin had questions about end of fiscal year close and closing in ALEPH before cutover.** Per Sarah, the AWG group proposed that end of fiscal year be done in ALEPH by June 7th before cutover; must be done in ALEPH first. Kristy reported that we do not have a definite date for the data extraction for the cutover. Jin explained that since Stony Brook has to schedule this work with campus IT, they need to know the date as early as possible. Kristy will share the firm dates as soon as they are available.
Jin asked about the status of resource sharing. Shannon and Kristy shared information about the status of resource sharing for SUNY; planning is being done through the working groups.

For next meeting....
Review minutes
After Sarah receives feedback from Jennifer Smathers (SMSP) she will reshare AWG 4 Best Practices: Using EOCR/EOD in the Network Zone for group to review
Sarah to review G3 Alma Institutional Workflow Scenarios and work on removing scenarios that are not Acquisitions related.

Minutes created by Kate Latal