Acquisitions Working Group January 28, 2019 Meeting Minutes

Attending: April Davies, MaryEllen Donathen?, Marianne Foley, Kate Latal, Sarah Maximiek, Leslie Preston, Susanna Van Sant

Not attending: Kristy Lee, Shannon Pritting, Jin Xiu Gou,

SUNY Acquisitions training
New Acquisitions training program was announced by Shannon today. General information about the curriculum which is geared toward new Acquisitions users can be found here: https://public.3.basecamp.com/p/9pnFPLvqgCFaovrSHWjnQFVt
Some members of the AWG plan to sign-up. AWG members who sign-up will try to see if they identify any “gaps” where AWG can help produce documents to fill in gaps or share ExL documents.

What next for AWG?
Sarah asked the AWG what they would like to work on next. Is there a new direction for the AWG? A document will be posted to basecamp for members to post/share ideas.

Sarah pointed out that the LSP libguide has an FAQ section that is also being used to roll out new Alma related documents. Group discussed whether AWG should work on content for the FAQs beyond the few questions that Sarah identified from basecamp.
Kate to use the list of questions/topics she recorded at the in-person training in December as a starting point for questions/topics. Sarah to work on this too. Draft to be shared with AWG before end of February.

Sarah reported that how/when to schedule EOY (or FYC) in ALEPH based on the cutover schedule will be discussed during the NZ discussion on Thursday. It is not known if the retrieval of the Worldcat master records (before technical freeze) has any impact on scheduling EOY (or FYC) in ALEPH. Records will be pulled in May, but there will be another load of the records at cutover. Any work in ALEPH after ALEPH technical freeze will NOT be reflected in Alma. AWG looks forward to getting clarification on this important topic. Sarah also asked Kristy for additional information about when to run EOY (aka FYC) in ALEPH via basecamp and is awaiting her reply. (UPDATE: from Kristi via Basecamp: am looking at the cutover schedule, the Tech Services Freeze for Group 1 starts 5/29, so I am proposing to set the EOY process deadline to Fri 5/24.)

Migration issues/Alma functionality
Sarah asked if anyone, other than Kate (Albany), had a problem with the Material Type in the order record? Albany has some order records with a blank Material Type field. No other members reported this problem. Per Sarah advised that this is most likely a migration form issue; data is coming from the Item record. She recommended reviewing how the orders without this Material Type are displaying in Alma and Primo. Lacking this data could be a problem when running analytics.
Leslie (FIT) has had an issue with orders left in review in Alma and what to do after an order is in review. She shared her screen and Susanna and Sarah walked her through ordering one of the orders in review and then creating a new order and using the Order Now function. The group also reviewed configuring the Acquisition Method options. Turning off options that a library will not be using can be helpful.

Next meeting (February 11th) is cancelled. We will meet in one month – February 25th.

__________________________________________________________

Posted by K. Latal, Jan. 28, 219