CALSTATE weekly call

Wednesday, March 29, 2017

11:00 AM

**~~START RECORDING~~**

1. Staff availability
* Mar 23-31: Brandon out
1. Primo status
* Individual institution Primo meetings began Mar 16 (Lynn & Jim)
* CSU continuing NR changes, with ExL assisting
	+ March Sandbox renorm in planning progress
* Publishing job will continue to be run manually (by ExL) 2x/month
* Authentication
	+ Progress – 3 campuses need their local IT to respond; 3 are working with ExL on issues; all others can at least log in.
1. Alma status
	* Cutover plan review
		+ Next step: ExL team to create cutover cases for each campus; CSU / campuses to begin working on migration forms / field mapping forms / AutoExtract kits
			- Group 1: 1st drafts due Apr 14; final forms May 1; data @ FTP May 13
			- Group 2: 1st drafts due Apr 21; final forms May 8; data @ FTP May 20
			- Group 3: 1st drafts due Apr 28; final forms May 15; data @ FTP May 27
	* Alma Health Checklists – next round should be filled out by Apr 15
		+ Start with your Feb checklist and update it with current progress
		+ Watch for more details and comments via Basecamp
	* [Alma advanced functional calls](https://basecamp.com/2275980/projects/10442780/todolists/41262088) (Thursdays, 9-10:30am Pacific)
		+ Topics for upcoming weeks
* Mar 30 - [Booking](https://basecamp.com/2275980/projects/10442780/todos/298022808) (Laurie)
* Apr 6 - [ERM topics (part 1)](https://basecamp.com/2275980/projects/10442780/todos/300994515) (Megan)
* Apr 13 - [ERM topics (part 2)](https://basecamp.com/2275980/projects/10442780/todos/300997181) (Megan)
* Apr 20 - [prep tasks for cutover](https://basecamp.com/2275980/projects/10442780/todos/300997225) (Dolph / team)

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* + - New WebEx call details

Link: [*https://proquestmeetings.webex.com/proquestmeetings/j.php?MTID=ma20c2acac9adac3abba1c35db27bfdbd*](https://proquestmeetings.webex.com/proquestmeetings/j.php?MTID=ma20c2acac9adac3abba1c35db27bfdbd)Meeting number / password: 719 859 699 / CalState!20171-408-792-6300 Call-in toll number (US/Canada)1-877-668-4490 Call-in toll-free number (US/Canada)Browser requirements:Please use a Java-enabled Internet browser (IE preferred)

**Chat transcript**

from jodi (privately):

We redid our scopes yesterday and today I am not coming up with content for one scope and it is really slow. Is there anything happening that would cause this behavior today or should I turn it into Salesforce?

from Dolph Chaney to Everyone:

from jodi (privately):

We redid our scopes yesterday and today I am not coming up with content for one scope and it is really slow. Is there anything happening that would cause this behavior today or should I turn it into Salesforce?

from yvonne (CPP) to Everyone:

when will be the new health checklist out? Or shall we use the old one?

from Lynn Higgins to Everyone:

Hi Jodi - please try going through each screen of your view and resaving each screen and then deploying. This is often the culprit when making tab and scope changes.

from jodi (privately):

Okay, thanks.

from yvonne (CPP) to Everyone:

Got you and thanks!

from Thoreau (SF) (privately):

Are there still plans for setting up Alma Shibbolith authentication?

from Dolph Chaney to Everyone:

from Thoreau (SF) (privately):

Are there still plans for setting up Alma Shibbolith authentication?

from jodi to Everyone:

I might have missed this... what is happening with Resource Sharing? We had the meeting where we were going to do hands on things and then it seemed to go away. I don't know who was organizing that and what is going on with that now. I think I heard that a campus was testing?

from Amanda (CSUB) to Everyone:

When do we need to make sure our OCLC holdings are updated by for the NZ bib file?

from Lisa (privately):

There is a spreadsheet for Resource Sharing to be filled out mentioned in the Access Services Open Forum this morning - https://docs.google.com/spreadsheets/d/1eD23n4FkEAmRG9MYqRY-lV5F0V6PO4WIFsKNBfcVafw/edit#gid=1143657255

from Fullerton to Everyone:

Hi, was this spreadsheet sent to all PM's? Our PM is on the road right now. Thanks!

from Tim Cal Poly to Everyone:

For Group 3: May we make OCLC updates between April 30 (start of NZ work) and our Tech Freeze date in late May?

from Lisa to Everyone:

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from Renaldo Gjoshe (privately):

will 360 data be also migrated for campuses that have 360 counter?

from David Walker to Everyone:

We'll be running the OCLC Master record extract on April 24

from Chris Bulock (CSUN) to Everyone:

During the time (starting 5/13 for Group 1) that we're not supposed to do configuration work, can we still enter data? I'm especially thinking of vendor records and acq info for institutions that are not migrating acq info

from Eva Sorrell to Everyone:

David: What will happen to any cataloging we do from 4/24 - tech freeze? If no other campus has, those records will just go to IZ?

from David Walker to Everyone:

We're still working out the details of the record sync during the rolling go-live, but we'll switch to nightly updates, grabbing the intervening records in the meantime

from yvonne (CPP) (privately):

Can you resend the ExLibris data submission FTP address pls.?

from David Walker to Everyone:

Eva: I expect that will be the case, and then we'll have to re-link them to the NZ after go-live

from Svetlana to Everyone:

Dear All, please make sure you have all vendors from your legacy system in Alma by date when production server configuration copied to IMPL for migration processes. Orders will not migrate for missing vendors. Thank you.

from jodi to Everyone:

What types of data issues would qualify as needing to be redone? Are there examples of what would be acceptable- and we should deal with in cleanup- and things that are not acceptable?

from Mike / SLO to Everyone:

I tested this, was pretty smooth.

from Eva Sorrell to Everyone:

It wasn't clear to me when we will lose access to our Alma environments.

from Tom (CSUEB) to Everyone:

David and Eva: Some of us are confused by what you are saying vis a vis cataloging 4/24-tech freeze

from Lisa to Everyone:

Dolph, Can you please share this spreadsheet with us?

from Ian Chan to Everyone:

true, thankfully, it was anticlimatic

from Eva Sorrell to Everyone:

Tom: If you read David's chat message above, they plan to pull the master records from OCLC to load into the NZ on 4/24

from Mark B. (Los Angeles) to Everyone:

Thank you, Dolph. Helpful to hear your remarks alongside what we see on the sheets.

from Chris Bulock (CSUN) to Everyone:

Thanks for that clarification

from Tom (CSUEB) to Everyone:

Thank you, Eva

from Tim Cal Poly to Everyone:

Where and when might 360 Counter and 360 RM customers fall in this process?

from Amanda (CSUB) to Everyone:

So, once we've submitted final migration/configuration forms, it's a good idea to stay out?

from Tim Cal Poly to Everyone:

Will saved analyses be retianed in Analytics?

from Amanda (CSUB) to Everyone:

ok, thanks!

from Tom (CSUEB) to Everyone:

freeze day for sfx earlier, correct?

from Tim Cal Poly to Everyone:

Does that include those shared in Community folder?

from Mark and Brian to Everyone:

You can save reports?

from Jeremy @ HSU (privately):

will patrons be loaded on 5/13 and updated on 6/11 or just loaded on 6/11?

from Tim Cal Poly to Everyone:

So those will be retained?

from Maria Pena to Everyone:

Do we use the same migration guide from last year?

from Tim Cal Poly to Everyone:

those in the Community foler

from yvonne (CPP) to Everyone:

Can you resend the ExLibris data submission FTP address pls.?

from Renaldo Gjoshe (privately):

dolph, please clarify for 360 customers, what will be migrated from 360 counter?

from Tim Cal Poly to Everyone:

OK Understood

from Holly Yu (privately):

Can you repeat your clarification to Chris' question "During the time (starting 5/13 for Group 1) that we're not supposed to do configuration work, can we still enter data? I'm especially thinking of vendor records and acq info for institutions that are not migrating acq info". Sorry I stepped out during the time. Thanks,

from Holly Yu (privately):

Hi Dolph, can you repeat your clarification to Chris' question "During the time (starting 5/13 for Group 1) that we're not supposed to do configuration work, can we still enter data? I'm especially thinking of vendor records and acq info for institutions that are not migrating acq info" Sorry I septed out during the time.

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from Jeremy @ HSU to Everyone:

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from Jeremy @ HSU to Everyone:

ok thanks

from Alice Kawakami to Everyone:

No, thanks for all the info.

from Carole @ SJSU to Everyone:

Thanks Dolph. Lots of good info today.

from yvonne (CPP) to Everyone:

Thanks!!

from Mark B. (Los Angeles) to Everyone:

Thank you again, Dolph.

from Ya (SFSU) (privately):

Thanks!

from Jeremy @ HSU to Everyone:

thanks