

00:17:43 Jen Masciadrelli, CARLI (she/her): :)

00:18:30 Jen Masciadrelli, CARLI (she/her): <https://el-una.org/meetings/eluna-2022-annual-meeting/>

00:19:20 Ted Schwitzner, CARLI (he/him/his):
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2022/May_2022

00:19:45 Ted Schwitzner, CARLI (he/him/his):
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/Release_and_Maintenance_Schedule

00:20:49 Jen Masciadrelli, CARLI (she/her):
<https://www.surveymonkey.com/r/almaconfidencesurvey>

00:20:52 Ted Schwitzner, CARLI (he/him/his):
<https://www.surveymonkey.com/r/almaconfidencesurvey>

00:21:46 Ted Schwitzner, CARLI (he/him/his):
<https://www.surveymonkey.com/r/TSCcataloging>

00:22:39 Ted Schwitzner, CARLI (he/him/his): Preliminary slides for today's session are posted on the event page, <https://www.carli.illinois.edu/tech-services-qa-4>
Recordings and slides for past Q&A sessions are on the Tech Services Q&A webpage, <https://go.illinois.edu/CARLItsqa>

00:23:42 Ted Schwitzner, CARLI (he/him/his):
https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Implementing_Acquisitions_in_Alma

00:27:43 Gail Heideman: I'd be curious if anyone has connected Alma with the campus financial system?

00:29:06 Ted Schwitzner, CARLI (he/him/his):
https://knowledge.exlibrisgroup.com/Alma/Product_Materials/010Roadmap/Alma_Roadmap_Highlights_-_January_-_2022/Acquisitions

00:31:07 Ted Schwitzner, CARLI (he/him/his):
https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Implementing_Acquisitions_in_Alma

00:37:36 blieber: Not required if we don't use Acquisitions, correct?

00:39:03 blieber: Thanks!

00:39:05 Jen Masciadrelli, CARLI (she/her): I've made a note!

00:54:58 Gail Heideman: Is there an analytics report that we can use to review open POLs before we run the Report mode to clean them up?

00:58:55 Jen Masciadrelli, CARLI (she/her): I've made another note to add this to our list of Analytics needs/wants

01:00:29 Audra M. Deemer (she/her): This is what I worked with last year and edited to work for us from ExLibris that worked like an "Open Orders" report: "Ex Libris - Orders sent within the last year and not marked as invoiced in Alma".

01:02:01 Jen Masciadrelli, CARLI (she/her): Thanks Audra!

01:04:00 Audra M. Deemer (she/her): I think you are the one that shared that with me Jen! :)

01:04:12 Ted Schwitzner, CARLI (he/him/his): [http://exl-edu.com/01_Alma/Extended Training/Fiscal_Period_Closure/#/](http://exl-edu.com/01_Alma/Extended_Training/Fiscal_Period_Closure/#/)

01:04:23 Ted Schwitzner, CARLI (he/him/his):
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/100Advanced_Tools/020Fiscal_Period_Closure](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/100Advanced_Tools/020Fiscal_Period_Closure)

01:13:56 Jen Masciadrelli, CARLI (she/her): Got it! :)

01:31:04 kdauksz: thank you

01:31:13 Audra M. Deemer (she/her): where to find that Open Orders report: Shared Folders/Community/Reports/Shared Reports/Reports/Acquisitions - Misc Reports/Open Orders - Various Iterations

01:31:47 Nancy Boulware: Thanks Ted! Great job!!

01:31:55 Gloria: If I do have a fund code that I want to change for next year, is it OK to do it if I know all orders with the previous code have been received?

01:33:55 Eric Willey (he,him,his): Not related to rollover, but we have started seeing French language subject headings added by OCLC in our bib records/search results. We haven't been deleting them but are concerned they will confuse patrons (esp. those using screen readers). We've considered looking to see if we can configure Primo VE to not display the 650 _ 6 fields, but wanted to ask 1st: does CARLI have recommendations on how to deal with these?
Example: https://i-share-isu.primo.exlibrisgroup.com/permalink/01CARLI_ISU/1vcthf/alma9921394055105845

01:34:07 Gail Heideman: Just tried the "Orders send within the last year" report and with one modification I think it worked!

01:34:15 Sarah Krause: I know we touched on this, but if we don't use Acquisitions would we still configure the fiscal year? Under configurations-acquistions-fund and ledger fiscal period for analytics purposes?

01:34:55 Kate Hartman: We have a number of standing order and subscription items that haven't been received in Alma yet. Does that all have to be done before rollover? (I'm not sure if the invoices have been entered yet)

01:35:14 Sarah Krause: Okay thank you! I see the fiscal year entered for 2021 for some reason

01:36:31 Sarah Krause: Understood Thank you!

01:36:37 Brent Eckert: Does anyone have a procedure for processing claims for periodicals, without having publication patterns set up?

01:39:41 Kate Hartman: OK, thanks!

01:41:09 Eric Willey (he,him,his): Thank you, will do!

01:41:33 Denise Green: Here's some from ExL
[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/050Display_Configuration/Configuring_Normalization_Rules_for_Display_and_Local_Fields)

01:43:28 Brent Eckert: Thanks, Jen.

01:44:18 Ted Schwitzner, CARLI (he/him/his): Preliminary slides for today's session are posted on the event page, <https://www.carli.illinois.edu/tech-services-qa-4>
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01:44:37 Gail Heideman: I have been looking at the DARA suggestions and noticed a bunch of things related to our record cleanup. Have any suggestions been made for how to use that to do record cleanup?

01:46:11 Gail Heideman: Yes!

01:47:37 Lori Thompson: Thanks

01:47:38 Kate Hartman: Thank you!