

CARLI staff ran the following informal poll for the first 10 minutes of the session.

Describe how you heard about today's session. Options included CARLI Website (16%), Technical Services Interest Group Email List (52%), I-Share Announce Email List (44%), library director (11%), and I-Share Liaison (7%).

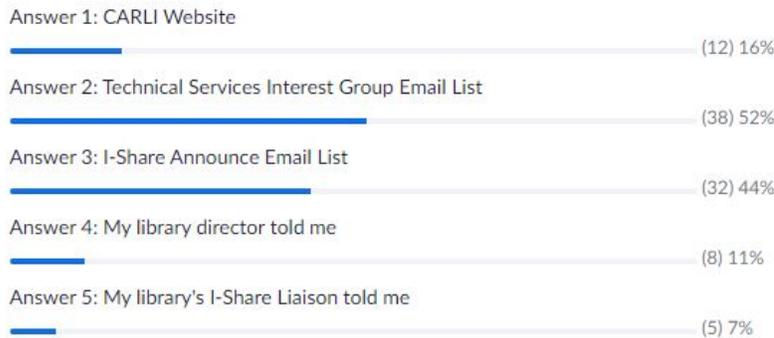
Edit Meeting Polls

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Title	Total Questions	Anonymous	
^ Poll 1: Informal communication poll	1 question	Yes	Poll is ended

1. Describe how you heard about today's session. (Multiple Choice)



00:16:21 Gloria: yes

00:21:37 Ted Schwitzner, CARLI (he/him/his): Reminder: Only Ex Libris can edit the ISBN data on Community Zone bib records.

00:21:59 Laurie Sauer: So you have to have the new title already localized to your IZ before relinking?

00:24:11 Jodi Craiglow: Laurie, I've been able to relink directly to the NZ -- at least with print and ebook records.

00:30:42 Andrea: Jen, The bib is currently suppressed. At this point you would need to take an extra step to unsuppress the bib, as well.

00:32:08 Ted Schwitzner, CARLI (he/him/his): Most likely, records in your production instances are unsuppressed rather than suppressed.

00:32:32 Ted Schwitzner, CARLI (he/him/his): In this workflow, suppression is not needed.

00:35:39 Joan Schuitema: Alma sometimes is not truthful about what it does

00:42:56 Mary Elzinga: when you reopen your polines you lose your PO and have to repackage it

00:43:55 Bill Schultz: Where was it you said that you can check to see the source of a resource? (e.g. ILS)?

00:44:38 Carol: Sometimes when I try to do something with a closed PO Line, I click the search button which takes me to a list of PO Lines, and I make sure to search nonactive (I think that's what they are called), and then you can use the closed PO Line. Not sure if that would help here.

00:52:09 lthompson: Is there a suggested search to find local P2E local portfolios and have PO Lines as a whole. For example portfolio standalone yes advanced search and portfolio PID is empty. If numbers match, can assume you don't have any PO Lines on local ones?

00:52:52 Bill Schultz: Thanks!!

00:55:03 Cynthia: You can do that in the acquisition tab of the portfolio

00:55:29 Carol: It does take a while.

00:57:15 lthompson: I had looked and didn't see any...was just doublechecking

00:59:15 Andrea:Laurie, You can run an advanced search on Electronic portfolios, Is standalone = Yes and then export the results. The excel file generated includes the POLs associated with the portfolios in your results list.

00:59:40 Laurie Sauer: For those IZ bib recs that have closed orders and have portfolios, could you just relink the portfolio to a new bib (CZ bib), and then suppress the NZ bib? Or is that bad practice?

01:03:14 Laurie Sauer: Yes, we had over 15,000 to begin with!

01:03:16 lthompson: Going to try that. Thanks Andrea. I do NOT expect to find any. but I always like to check.

01:04:10 Laurie Sauer: If you delete it how does that affect the PO?

01:06:31 Andrea:Correction, the export file includes either 0 or 1 under the column labeled Orders (not the actual POL)

01:07:44 Laurie Sauer: Okay, so there's no hard link between the PO line info and the bib record itself?

01:09:44 Laurie Sauer: Thanks. I suspect almost all of ours are going to closed POs.

01:12:22 ericw: Why can't we still have 2 windows

01:12:25 ericw: at the same time?

01:13:10 ericw: I swear that we could when they first had shown it.

01:13:23 ericw: They just need to use contiguous cache on server side

01:13:33 Andrea:The Alma server still recognizes you as the same user since you are using the same browser.

01:13:46 Jodi Craiglow: I've been using Chrome and Firefox running simultaneously, and it seems to work.

01:13:47 Andrea: rather same user in same session

01:13:58 Holly Ewan Nordheden: Requested a second monitor so I can at least look at another bib that I'm using as a template at the same time

01:14:02 O Swann: I also have no problem with two instances in different browsers

01:14:04 Gail H: I've done it in two different browsers, but it does know you are logged in twice.

01:14:13 ericw: Yeah, I have 4 screens here

01:14:33 ericw: Great idea with 2 browsers! I'll have to try that out.

01:14:38 kathy: What process do you recommend for suppressing items in alma and oclc during the acquisitions process? We seem to be having trouble with new items showing in OCLC even though we have clicked on the don't publish option.

01:14:44 O Swann: But, yes, I have had very weird problems trying to have multiple instances in the same browser

01:14:53 Gail H: It is tricky to use 2 browsers.

01:14:57 Brent Eckert: Recently I've come across several instances of duplicate OCLC records in the NZ. These were exact duplicate records, not different records that had subsequently been merged in OCLC. How would that happen?

01:17:12 Andrea: If you can, try to get a second monitor. Makes your life much easier.

01:19:06 Lauren Noel: Thanks for the suggestions of using multiple browsers. This will really help with the still-steep learning curve. :)

01:19:18 kathy: right

01:22:31 kathy: if clicking "don't publish" is not suppressing the item in oclc, what do you recommend?

01:23:46 Brent Eckert: What does "publish holdings only" do as opposed to "publish bib records"?

01:23:51 Tammie Busch: Ted, has the problem with the import profile for electronic resources been fixed? Our import profile for electronic YBP PDA records has the import profile to don't publish, but I still get report from data sync that it is trying to publish.

01:24:16 kathy: thank you. that was helpful

01:26:33 Tami Luedtke: We're having trouble with our electronic resource order import profiles actually doing what we've set on the Set Management Tags too

01:27:44 Brent Eckert: I don't have any example right now.

01:30:24 Jolanta Radzik: Should we report duplicate OCLC records in NZ to CARLI to be merged? Or should we merge them ourselves? What would be the best practice.

01:30:29 Joan Schuitema: Ted....in reference to things taking awhile to happen....I've had that happen with downloading an OCLC record and it takes so long that I think it didn't take and do another.....but I've caught it and delete the extra...but it can happen

01:30:52 Jolanta Radzik: Thank you.

01:31:02 Brent Eckert: But records imported from OCLC are supposed to overlay any record in the NZ based on OCLC number. It seems that maybe that hasn't always worked?

01:31:21 Holly Ewan Nordheden: I have one bib waiting in an OCLC save file that I can't import via the Gateway because I get an error message saying too many matches. Do we have a solution or workaround for that?

01:32:49 Tammie Busch: Yes, I have a ticket.

01:34:56 Holly Ewan Nordheden: More explanation on import profiles would be very helpful

01:35:00 Sarah Levine French (she/her): that would be great

01:37:40 Gail H: I've run into this issue as well in the Metadata editor, when I search the IZ and the CZ I don't find a match, when I try to import from OCLC it says there is a match.

01:37:57 Holly Ewan Nordheden: Unfortunately it's a heavily edited record so there's no way to get my saved file record?

01:38:05 Brent Eckert: You can merge the duplicate records in the NZ or report them to CARLI to solve the mult match problem.

01:39:49 Holly Ewan Nordheden: thanks for some things to try

01:40:54 Holly Ewan Nordheden: I guess I could also see if I can lock/replace the record in OCLC with my updates ...

01:42:52 Laurie Sauer: Thank you very much!

01:42:54 Lauren Noel: Thanks so much, Everyone! This was very helpful!

01:43:03 Sylvia P: Thank you!

01:43:10 kathy: these are helpful

01:43:11 Lori Murphy: Mahalo

01:43:20 Cynthia: Thanks for the presentation !!

01:43:24 Amanda: Thank you so much!

01:43:27 Jolanta Radzik: Thank you.

01:43:28 Sue Wilson: Thanks!

01:43:28

Holly Ewan Nordheden: Helpful as always!