

Aleph Working Group: March 2011 Meeting

March 16, 2011, 10:30-11:30 am, 248 Hesburgh Library

Agenda:

Aleph 22 enhancements voting (Aaron)

- brief report on what we voted for: Aleph 22
 - CAT-02: 100/240 enhancement (30 points)
 - CIRC-04: record changes to patron records (30 points)
 - SYS-04: for multiple holdings records, export all of these to Primo (40 points)

Updates: LISD Aleph Project Priorities (Pascal & Aaron)

- eBrary pilot with GOBI integration (March-April 2011)
- Standing Orders and Serials Encumbrances, Phase 1 & 2 (Mar-June 2011)
 - Standing Order Project: To remove standing order subscriptions from serials funds and transfer them to their own budget line for fiscal year 2012. Serials met with Kelly McNally [?](#) and Cynthia Harris to discuss the project. Standing orders are the least predictable expenditures and if transferred to their own budget line will help aid in the overall allocation process for serials. The libraries spend approximately \$250,000 a year and have approximately 1,000 current standing orders. Cynthia Harris has to identify new consolidated standing order funds. Serials will need to meet with collection managers to discuss the changes. Orders will have to have revised allocations and be updated to include new funds. Serials would like to have this part of the project completed by the end of 2011 fiscal year so when we complete fiscal year end period close and roll over to 2012 this part of the project will be completed and in place. At the end of the fiscal year, an evaluation will be completed to determine the success. The goal is to fiscally be able to manage standing orders more efficiently.
 - Serials Encumbrance Project: To encumber all ongoing serials at point of roll-over based on the previous year's expenditure (inflation rates could be calculated and budgeted in as well). This would commit the money to the funds and reserve the expected expenditures. It would also assist in making mid fiscal year budget projections more accurate. In addition, it would allow for more effective monitoring of unpaid subscriptions throughout the year.
- Hesburgh Circulation bill & fine automation (March-summer 2011)
- Shelf ready w/YBP for Music & Architecture (April 2011+)
 - Mary is most interested in the cataloging aspect as we move forward with YBP/OCLC services for mainstream materials. For books received on the YBP approval plan, we will be phasing in receipt of those materials shelf ready with cataloging records delivered simultaneously. To take full advantage of shelf ready services, ideally when we receive the record, full items and holdings data would be generated in ALEPH so we wouldn't have to touch anything.
- Procurement & payment automation (June 2011+)
- EDI Invoicing: YBP (July 2011+)
- OCLC [WorldCat ?](#) Selection configuration & implementation (Fall 2011?)
 - in FY 2009 Libraries purchased this; priority is after YBP EDI implementation & shelf ready is complete
 - What do they need help with? Liaison with OCLC on technical aspects; revise EDI as necessary if

YBP included; configuration, testing, implementation, acceptance, training

- RDA implementation or accommodation:
 - Most of the cataloging world is waiting to see how the US national libraries come down on RDA adoption. This decision should be public in June, right before annual ALA. Regardless of whether they or we adopt RDA completely (i.e. switch to doing all our original cataloging in RDA, make sure every new record comes in conforms to RDA, etc.), we will most likely have to accommodate RDA records in our catalog and in PRIMO because some institutions will use RDA regardless and if that's what out in OCLC for a given item, that's what we'll be bringing in. * What do they need help with? Mary plans to convene an RDA working group which would have to include representation from, among others, LISD, MALC and Law, I think, because we have to consider the implications for PRIMO as well as ALEPH. I see the biggest technical consideration being how we convey material type to the user with the elimination of the GMD in RDA (245 \$\$h) and its replacement with 336, 337 and 338. In addition, if RDA is widely endorsed, many authorized headings could change. One example that would impact us is uniform title headings for books of the Bible. The O.T. and N.T. designations have all been dropped so we might have a lot of global updates to do for anything that wouldn't be handled by MARCIVE. There would be a lot of minor table changes to recognize/validate new fields, etc in both bibs and authority but these might be taken care of by Ex Libris through rep changes.

Other topics?

- Duplicate barcode report from 2010: Hesb Circ is complete 162/318 pages (Tracey)
- CSLC: Cindy Hoffman will be trained by Tracey to help CLSC collection; (Tracey)
- Chem/Physics is getting a large collection of equipment for highschool teachers program this summer; they are using Aleph for inventory management of these (Tracey)

-- [PascalCalarco](#) - 16 Mar 2011

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