

PALS

Support and Training Services Report MnPALS Consortium Spring User Groups April 20 & 21, 2006

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Support & Training Services

Even as the level of Aleph expertise of the PALS Support Staff grows daily we have discovered that more time is required to answer questions. Problem resolution for Aleph is much more complex in general than what we have experienced in the past.

If you feel that you have not gotten as timely a response to a support request as you anticipated, please notify Cathy Kolbinger at cathy.kolbinger@mnsu.edu or call the PALS eDesk phone. Include the reference number of your request or have it handy if you phone.

PALS eDesk

In October, 2005, the PALS Customer Support eDesk migrated from Clientele to the RightNow Technologies software. The new eDesk went live on October 17 and has been well received by the PALS libraries. Due to the migration from old to new the statistics available this year are from November 1, 2005 through March 31, 2006.

In the table below it is estimated that the numbers are under-reported by approximately 20 percent. Efforts to direct libraries to the eDesk are improving but not at the 100 percent level. We continue to encourage staff from our libraries to enter requests into the eDesk.

eDesk Service Summary				
Date	Searches of End User Pages	Answers Viewed	*Sessions	Support Requests via the eDesk
Nov. 05	202	633	865	190
Dec. 05	797	475	1026	219
Jan. 06	1490	1039	1581	348
Feb. 06	1072	751	1521	351
Mar. 06	920	537	1581	341
Total	4481	3435	6574	1449

**End-user session starts when an end-user visits any end-user page and ends when a log off or time out (1 hour) has occurred.*

You can link to the PALS eDesk at <http://pals.custhelp.com>. There are tutorials available from the PALS homepage at <http://www.pals.msus.edu/pals/palshelp> for using the eDesk. If you can't find what you need or you experience problems using the eDesk, please call PALS Support at 507-389-2000.

PALS eDesk Tips

- When to call and when to put in a request to the eDesk? The best practice is to always put the request into the eDesk first. If the problem is an emergency or you feel you need to talk to a Support Specialist regarding the problem, follow up the eDesk request with a phone call to PALS. Please have the reference number from your eDesk request handy. When library staff enter requests into the eDesk this really helps the PALS Support Staff out considerably. We are able to do advance checking on requests prior to getting back in touch with library staff. This saves everybody time. Due to the nature of Aleph there is some minor setup involved on our end to be able to look at problems within your library. There are also no delays while you wait for the information to be entered into the eDesk. We appreciate your assistance with this.
- Please enter separate requests for each question or problem. This allows the specific question to be directed to the person most appropriate to respond. If unrelated questions are included in one request a response can be delayed as the request gets routed around to different Support Specialists for their attention.

- Include examples, barcodes, and system numbers whenever possible. This helps Support Staff replicate your problem and then look for the source.
- An "Organizational View" has been added to the PALS eDesk. When you are logged in to the eDesk and on the My Stuff tab check out the link to your questions. Above the list of questions there is a drop down menu that will let you choose to view either just your questions or those sent by your organization.

Public Libraries

Support for Pioneerland and Traverse des Sioux public library systems has stopped. We enjoyed working with the staff at both of these public library systems and will miss the contact.

Staffing Change

- Frank Embree, PALS Online Knowledge and Learning Support Specialist, is new to PALS in April, 2006.

Evaluations

Evaluations will be sent out electronically to the PALS discussion list. Watch for the announcement following User Group.

Aleph Implementation

The Eta Library group has almost completed all of its training and will switch to production after returning from MnPALS User Group Meetings. This is the last group of libraries to migrate to the Aleph ILS. Three library groups will have migrated to Aleph in the last year. The Epsilon and Zeta library groups switched to production in January of 2006.

There is a huge sense of accomplishment among the PALS Support Staff to have all of the consortium libraries on Aleph. We anticipate returning to a more normal mode of operation. At the same time we honestly don't know what normal will be. Our hope is that we can begin to address some of the additional needs for Aleph that our libraries have already identified as important.

Focus will now turn to Aleph version 17. We anticipate that the effort required to get all of the libraries onto this version of the software will be significant.

Training and Workshops

Aleph Migration Training

17 days of in-person training and 4 half-days of webmeeting training were offered to each of the Epsilon, Zeta and Eta library groups. Each of these sessions was offered 2 times to the Epsilon and Zeta library group and 3 times to the Eta library group. The total number of training days provided to these migrating libraries by PALS trainers was 85 days of in-person training and 20 webmeeting training sessions.

We continue to offer webmeeting refresher sessions to migrated libraries shortly after their switch to production date. Sessions are offered in Acquisitions, Serials, Cataloging and Circulation.

Training for Aleph ILL is under way. Sonja Eilertson has undertaken a Herculean effort to have all of the MnPALS libraries trained on Aleph ILL by the end of May, 2006. Aleph ILL training constitutes one day of in-person functional training preceded by sessions to set up and configure tables to allow Aleph ILL to work properly.

For a complete list of Aleph Migration training sessions offered please see the following links:

Epsilon/Zeta Libraries Training Class Schedule www.pals.msus.edu/aleph/epzclasses.html

Eta Library Training Class Schedule www.pals.msus.edu/aleph/etaclasses.html

Upcoming Scheduled Training Sessions

- ILL Training, April 24, Moorhead
- ILL Training, April 27, Grand Rapids
- Post Eta library STP WebMeeting Refreshers in May and September
- ILL Training, May 11-12, Metropolitan State University
- Course Reserve WebMeeting Training, May 10
- ILL Training, May 17-18, Metropolitan State University
- ILL Training, May 23-24, Metropolitan State University
- XSL Report Configuration Workshop - Tentatively scheduled for June 21, in the Metro Region
- Course Reserve WebMeeting Training, August 16
- XSL Report Configuration Workshop - Tentatively scheduled for Sept. 13 at the PALS office
- XSL Report Configuration Workshop - Tentatively scheduled for Sept. 28 in the Metro Region

PALS Support and Training services plans to continue to offer opportunities for libraries to refresh or learn new Aleph skills. We are always interested in receiving suggestions from the MnPALS libraries regarding workshops and training sessions that would be of value to them.

Conference, Training, Workshops attended

- RightNow Demo/Presentation (Brainerd) - October 25-28, Kyle & Frank
- ILL Implementation conference call with MINITEX & U of M - October 27, Sonja, Becky & Susan
- Epsilon/Zeta Conference Calls - All Support Staff in office
- MnLINK User Group Meeting (St. Paul) - October 31, Cathy & Linda
- St. Paul College RightNow Implementation (St. Paul) - October 31-November 1, Kyle & Frank
- Minnesota Online Meeting (Minneapolis) - November 1, Perry
- PALS, MINITEX, U of M ILL conference call - November 1, Sonja
- Metro State RightNow Demo (Minneapolis) - November 2, Kyle
- DARS/CAS RightNow Meeting (Minneapolis) - November 3, Kyle
- Authorities Task Force - November 4, Mary Ann
- Intellectual Property implementation (Minneapolis) - November 7-9, Kyle & Frank
- Minnesota West Community and Technical College: RightNow Implementation Kick-Off - November 15-17, Kyle & Frank
- MATF Conference Call - November 21, Perry & Cathy
- Professional Development Day, Minnesota State University, Mankato - January 11, Cathy, Dee, Mary Ann
- Eta Conference Calls - All Support Staff in office
- CISCO Training - January 31 - February 3, Dan & Paul
- Using Microsoft Word 2003 for Multi-Page Documents - February 1, Michele
- Using MavDISK - February 1, Michele
- MINITEX Forum - February 8, Perry
- MnLINK/MINITEX ILL Subcommittee Meeting - February 9, Susan
- RightNow Implementation, ARC - February 10, Kyle
- eFolio Implementation - February 16, Kyle
- MnOnline Training/Implementation, Perham - November 28 - December 1 - Kyle & Frank
- Serials Solutions Demonstration - December 6, Mary Ann, Cathy & Linda
- Validation Working Group - December 7, Mary Ann
- RightNow Demo South Central College - December 7, Kyle

- MnSCU Webmasters Meeting - February 16, Perry
- CISCO Training - February 20-24, Dan & Paul
- NDC RightNow Demonstration - February 23, Kyle
- Perceptions... OCLC seminar held by MINITEX - February 28, Becky
- RightNow Agent Training for MWW - February, 6-7, Kyle
- Ex Libris Regional Meeting - March 7-8, Cathy, Mary Ann, Sonja & Perry
- XSL Report Configuration Workshop -March 21, in Duluth, Dan & Rod
- XSL Report Configuration Workshop -March 22, in Bemidji, Dan & Rod
- XSL Report Configuration Workshop -March 21, in Moorhead, Dan & Rod

Task Forces and Working Groups

PALS Support Staff continue to be involved with our libraries in several task forces and study groups. The following is a list of the task forces and study groups that Support Staff have worked with or served on during the last year:

- Authorities Task Force - Mary Ann Greenwald
- Database Quality Management (DBQM) Task Force - Mary Ann Greenwald
- Indexing Task Force - Mary Ann Greenwald
- Minnesota State Library Standards review task force - Becky Bell
- MnLINK ILL Development Group - Sonja Eilertson & Becky Bell
- MnLINK ILL Testing Group - Sonja Eilertson & Susan Dueis
- MnLINK Item Booking and Media Management Group - Sonja Eilertson
- MnPALS Access Task Force - Perry Madden
- Validation Tables Study Group - Mary Ann Greenwald

Professional organizations, state wide meetings and keeping current on technology remains a priority. These activities provide us with opportunities to learn what's important to libraries, keep current on technology, and allow us to have additional contact with our libraries. During the past year we have participated in: ARLD, CALCO, CISCO Training, eStudent Services Committee, LaSSI, MLA, MnLINK Gateway Operations, MnLINK ILS Operations, MnLINK User Groups, MnSCU Libraries Day, MnSCU WebMasters, NAAUG, Regional Ex Libris Users Meeting, RightNow User Conference and many other library related seminars and presentations

Learning Management Systems - Kyle Snay

RightNow Technologies

Demand and interest for the RightNow Technologies customer service solution has significantly increased over the six months. PALS adopted RightNow to be the support vehicle for their eHelp Desk. As a result of the increased demand, PALS has hired another support specialist to assist with RightNow implementations, training, and support.

FuseTalk

In December, PALS initiated an online discussion forums application called FuseTalk that's designated to replace the WebBoard system that went down last year. Currently the FuseTalk application is being released at a pilot level but the responses from users have been favorable so the demand is expected to increase significantly.

MnLINK Gateway - Susan Dueis

The PALS office continues to provide user support to the Consortium of MnPALS Libraries in their use of the Fretwell-Downing ZPORTAL (searching) software. Two groups of libraries have begun using Aleph ILL software and this necessitated working with Fretwell-Downing to make changes in the setup in ZPORTAL to transfer requests initiated by Aleph users in ZPORTAL into the Aleph ILL software for management. As the rest of the libraries on Aleph begin using Aleph ILL, we will be changing their setup to transfer requests from ZPORTAL into Aleph ILL.

We have gotten the password field to be case insensitive for Aleph users signing in to ZPORTAL.

We continue to work with Fretwell-Downing on the following:

- Changing the mapping from the ELM databases in ZPORTAL, so that the year is in a separate field to aid in tracking copyright compliance.
- Adding a link from "My Requests" in ZPORTAL to direct the user into the user interface of the ILL module in PALS or Aleph, so they can check the status of their requests there.

The PALS office continues to represent the Consortium of MnPALS Libraries on the MnLINK Gateway Operations Committee, which meets quarterly.

Questions?

Please send any questions regarding the Support & Training Report to <http://pals.custhelp.com/> or catch one of the Support and Training Staff at User Group.

PALS Subsystem Reports

Acquisitions - Dee Nolan

BOOKS IN PRINT

Bowker has contacted us regarding the pricing proposal for libraries to renew their subscription. The PALS office will be contacting the current users of BIP to renew their subscriptions. If there are any libraries that are not using BIP and would like to begin using it, please contact the PALS eDesk.

EDI Book Ordering

We have three EDI vendors set up in ALEPH for book ordering. The three vendors are Baker and Taylor, Midwest Library Service and Blackwell Book Services. There is a minimum amount of set up needed before a library can begin sending EDI orders to these vendors. Documentation is available on the EDI ordering process. Basically after completing an order, the library runs a service that FTPs the file to the vendor. If any libraries are interested in using these vendors for EDI ordering, please contact the PALS edesk.

13 Digit ISBN

ALEPH is to be compliant with the 13 digit ISBN in version 18. In our version, 15.5.2 it will allow you to enter a 13 digit ISBN in the BIB record, but not the order record. Presently, there is a setting in your TAB10 that does a validity check on the 10 digit number. We can change that setting so that ALEPH will allow you to enter a 13 digit number in the ISBN field of the order record. If we change the setting, it will not do any kind of a validity check. It will allow you to enter anything you want in that field, 6 digits, 8 digits, 12 digits, etc. If any library would like us to change that setting so that you can enter 13 digit numbers into the order form, please send your request to the PALS edesk.

Cataloging - Mary Ann Greenwald

Libraries Using PALS^{TAC}:

1. **netLibrary-MINITEX Public Library Collection - 2005.** 505 records were loaded in March, 2006 from this file for Rasmussen College.

ALEPH Libraries:

1. **2005 netLibrary Shared Collection set IV** - 1,581 records were loaded in January, 2006 for: Crown College, Fire/EMS Safety Library, Minnesota West CTC-Worthington, Ridgewater College Library-Willmar, Rochester Community & Technical College, South Central College-Mankato, Southwest Minnesota State University, St. Cloud State University, St. John's University, and Winona State University
2. **2005 netLibrary Shared Reference Collection** - 163 records were loaded in January, 2006 for: Rochester Community & Technical College, South Central College- Mankato, and Winona State University.
 - *****NOTE - #1 & #2** --- PALS received a fix for the netLibrary loader so that the MnPALS Aleph libraries could have these loaded.
 - **netLibrary-MINITEX Public Library Collection - 2005.** 505 records were loaded in March, 2006 from this file for Minnesota State Law Library and Northwest Technical College-Bemidji.
 - **Caption and enumeration display in Search Module NavMap brief display.** The 853/853X (basic bibliographic units), 854/854X (supplementary material), 855/855X (indexes) captions and patterns have been added to the NavMap display tables.
3. **Clarification of Type & Format in Aleph.** A new document has been written to explain this. The document is located at: <http://www.pals.msus.edu/aleph/clarificationofformatandtype0602.pdf>.
4. **Correct and Correct Display feature should be turned OFF in privileges.** The Correct feature from the GUI OPAC Search module allows anyone with privileges to correct bib record headings. This should be turned OFF so that you do not change another libraries' subject headings. You not only change the subject heading, but your cataloger level is now applied to that bib record. If your cataloger level is higher than the OWN library cataloger level, the OWN library will not be able to do maintenance on their bib record. With the current group of migrating libraries (Eta), PALS has changed their default permission to disallow the Correct feature. But, for previously migrated libraries, you must be sure to disallow this in the privileges. If you need help, contact PALS eDesk, attn: Dan Honetschlager.
5. **New 'Aleph Indexes' document - March 2006.** The newly updated Aleph Indexes document for SYS01, SYS10, and SYS60 is located on the PALS Aleph Implementation Documents page (near the bottom of the page): <http://www.pals.msus.edu/aleph/syslibs/home.html>.
6. **Report on PALS Action items from Cataloging Fall 2005 User Group**
 - a. Strip junk tags from a record before it is put into the Aleph database. Can PALS correct the records with an OCLC-fix routine? Yes, PALS can create a fix routine, but needs to know from the Cataloging User Group which tags to strip. Workplan priority #4.
 - b. Add a Service to identify/create a report of unlinked holdings and items. PALS has added this to the Workplan with a priority of 4.
 - c. The entire Aleph database on the production server was re-indexed over the December holiday break due to the Epsilon & Zeta libraries migrating to Aleph. Changes in Aleph indexing, approved at the Cataloging User Group on October 25, 2005, implemented at this time were: a) tab_type_config table for SYS01 - Format name changes were made (PALS changed logical bases to reflect these changes) and the order of types in this table was

changed. New format choices have been included in the March, 2006 Indexing Document. b) series indexing - create 2 browse indexes. The first index includes \$v and is accessed from a search interface in the OPAC. The second omits \$v in the indexing and is only accessible from access fields in the record display. Hyperlinks in the OPAC shall only be from access fields (440, 800, 810, 811, 830) not description fields (490). Hyperlinks will cause a browse search for the series title and display a collapsed or group list for the records matching the series title. c) The following are indexing changes that were approved, but need further review: indexing fixed field/control fields, indexing SYS60, MINITEX/Minnesota State Library Indexing Standards; d) other indexing changes that were made during the re-index were done to fix problems. They were: fix the title sort to correctly use the non-filing indicator and fix the call number character conversion for Dewey call numbers.

7. **Validation table updates.** Validation tables for allowed fields, indicators, subfields and dependencies between fields were corrected to the current standards for SYS01 on the production server, Harp. "this is a duplicate in the index" appeared up to 5 times in the content validation error messages. This has been eliminated from appearing. Work will begin on correcting the validation tables for SYS60 and SYS10.
8. **Import of OCLC records to Aleph from Cat Express.** This has been tested at PALS with a file of OCLC records. A document "Importing Records into Aleph" has been written to explain the procedure. Pine Tech College uses Cat Express and they have used this document to successfully import their OCLC bib records into Aleph.
 - a. NOTE: The document can be found on the PALS homepage under Aleph secure documents, Cataloging functional training, section 9c. "Importing Records into Aleph".
http://www.pals.msus.edu/aleph/syslibs/docs/func_training/cat/home.html.
11. **SYS60 pattern prediction templates on website.** The Fall 2005 Cataloging User Group approved placing the 30+ system provided pattern prediction templates on a website. This is a priority #3 on the Workplan. Since the Fall user group meeting, libraries that have just migrated and are to migrate to Aleph expressed interest in retaining these templates in the GUI client. They have had no opportunity to work with the templates in the client.
12. **Review/evaluate rejected authority records.** The Authority Task Force, along with PALS staff, have evaluated the rejected authority records in the SYS19 library. It was determined that 80-85% of the records are cancelled and should not be in the SYS10 library. PALS staff needs to do some further evaluation.
13. **p-auth-03 report in the Aleph Cataloging module.** p-auth-03, list unauthorized headings report, was in the Cataloging Services. The PALS office tested it against our TST library and felt it worked. But, when libraries began using it against their larger collections, they came up with hundreds of pages listing subject headings. PALS asked Ex Libris how p-auth-03 was to work. Ex Libris said that ... "p-auth-03 does not look at the authority library at all. Candidates to be included in the list of unauthorized headings is based on headings in the browse index. Look at the browse index in the GUI for one of the headings that shouldn't be in the report and see if the 'Auth. Info.' column is blank or points to an authority record." Based on this information, PALS has removed the report from the batch services. The ticket still remains open with Ex Libris asking for a way to run a service that will pull "unmatched headings", similar to what we received in PALS.
14. **Load of MARCIVE (government document) records.** Since the load of MARCIVE records continued to be in a backlog status due to the Aleph loader not working, PALS management gave an update of the situation to the User Council and Executive Council on January 18, 2006. The Executive Council recommended a meeting be held of MnPALS Government Document Libraries (Present: BSU, GAC, MSL, SCS, SBJ, SMSU, TRM, WSU. Absent: MSU/Mankato) to discuss the issues. The Government Document Libraries met, via conference call on February 23, 2006.

- a. Action was taken in these areas for the 6 libraries that purchase MARCIVE records: a) SCS receives these records with multiple 049 codes. The loader cannot create more than one holding and item record. SCS agreed to identify their multiple 049 records from the Titles List and manually create holding and item records for them. SCS has all their backlog records loaded: b) SBJ needed to have their file of records from December '05 to the present loaded. Those have now been loaded with the automatic creation of holding and item records. Duplicate records in the online records still exist and this is being investigated: c) GAC backlog of bib record files to January, 2004 have now been loaded, along with the automatic creation of holding and item records. A problem exists with searching the records by utility number (035 1st indicator 9; e.g. ocm12233456). This problem has been sent to Ex Libris: d) SMSU, WSU, and BSU - configuration parameters are being obtained by PALS to setup their loader table.
- b. PALS has access to the old and new MARCIVE loader. The old will just load bib records: the new will load the bib record and automatically create the holding and item records. PALS cannot use one loader for one library and the other loader for another. It takes too much setup time. Therefore, only the new MARCIVE loader will be used.
- c. Government document e-records are available from MARCIVE in an online file. Libraries were interested in having PALS purchase the online file and load it to any MnPALS library catalog that would want it. In checking with MARCIVE, they would require a subscription for the online file from each library; not just one file to PALS.

Circulation - Susan Dueis

Aleph Circulation Issues

From Fall 2005 report:

*We have an outstanding ticket with Ex Libris because p_cir_25 (which rebuilds the local patrons index) is taking over 6 1/2 hours to run on our production system. This is too long—we do not have a 6 1/2 hour window every night when our libraries are closed, so the process is extending into hours when some of our libraries are open. If the process is still running, you will not be able to see your patron list in Aleph Circulation, until the process is done. If a library happens to update a patron record while the process is still running, then things get corrupted and additional time is required to fix things. **We would like to ask people to refrain from making changes to patron records in Aleph if they cannot display their patron list.** If you are able to see your patron list, that should mean the process is done and you can then make changes to patron records. This process has been getting done about 8:30 a.m., typically. We hope to have a fix soon for this and will message this list when we do.*

We got a fix from Ex Libris so that we no longer need to run the p_cir_25 on a daily basis. The Z353 tables are updated at the time of the PLIF load each night. You will be able to see your patron list now without delay each morning.

PLIF Changes

A problem was found at ISRS that entire registration records were not coming through. A fix was found and will go into production on April 3. A fix has been put in production for the issue of leaving the barcode flag set when patron registration for classes is delayed so we will still get the barcode with updated ISRS data.

Item Booking and Media Maintenance

Item Booking and Media Maintenance will be implemented with the move to Aleph version 17.

Inventory

Progress is being made regarding inventory. MSU, Mankato will be testing sending a file of barcodes that has been recently collected. The PALS office has identified a process that libraries will need to use for inventory. The process involves collecting the barcode file, FTP'ing this file, moving the file to the Aleph server with a service PALS wrote (p-mnpals-11), running the Item-06 Rebuilding Call # Index service and then running the Item-04 Shelf Reading Report. Preliminary testing has identified problems with running the Item-04 Shelf Reading Report and has been reported to Ex Libris. We hope to be able to share additional news of the testing at the Spring Circulation Users Group. We appreciate MSU's testing of this process.

Course Reading Pickup List

There is a bug in the course reading program that ***should*** create the request for a pickup list. Ex Libris did create a fix, rep change 2498. PALS has tested the fix, but the problem remains. The problem has been resubmitted to ExLibris.

Interlibrary Loan - Sonja Eilertson

Implementation of Aleph ILL is in process. The First group began using Aleph ILL on February 27, 2006. A Second group began using Aleph ILL on March 23 and the Third group began using Aleph ILL on March 28.

The libraries currently using Aleph ILL are:

- Attorney General Library
- College of St Benedict
- Crown College
- Department of Employment and Economic Development
- Department of Revenue
- Gustavus Adolphus College
- Legislative Reference Library
- Minnesota State Law Library
- Minnesota State University, Mankato
- Minnesota West Community and Technical College Canby
- Minnesota West Community and Technical College Granite Falls
- Minnesota West Community and Technical College Jackson
- Minnesota West Community and Technical College Pipestone
- Minnesota West Community and Technical College Worthington
- Pollution Control Agency
- Ridgewater College Hutchinson
- Ridgewater College Willmar
- Riverland Community and Technical Albert Lea
- Riverland Community and Technical Austin
- South Central College Faribault
- South Central College Mankato
- Southwest Minnesota State University
- St Cloud State University
- St John's University
- St Mary's University Twin Cities
- St Mary's University Winona

The next group to start using ALEPH ILL will be:

- Alexandria Technical College
- Bemidji State University
- Minnesota State University Moorhead
- Concordia College
- College of St Scholastica
- Central Lakes College
- Fond du Lac
- Hibbing Community College
- Itasca Community College
- Lake Superior College
- Mesabi Range Community and Technical College
- Minnesota State Community and Technical College Detroit Lakes
- Minnesota State Community and Technical College Fergus Falls
- Minnesota State Community and Technical College Moorhead
- Minnesota State Community and Technical College Wadena
- Northland Community and Technical College East Grand Forks
- Northland Community and Technical College Thief River Falls
- Rainy River Community College
- Vermilion Community College
- Northwest Technical College Bemidji
- Pine Technical College

They will start using Aleph ILL April 26 and April 27.

More Aleph Interlibrary loan training will occur on May 11-12, May 17-18 and May 23-24.

In addition to other MnPALS libraries that have started using Aleph ILL the libraries can also exchange ILL requests with MINITEX. MINITEX manages two ILL units on the University of Minnesota server, one as the University of Minnesota Twin Cities and the other as last resort MINITEX.

MnPALS libraries that have switched to Aleph ILL are continuing to accept lending requests from PALS libraries. MnPALS libraries that have switched to Aleph ILL continue to manage existing PALS ILL requests.

Thanks to MINITEX, University of Minnesota, Ex Libris and the libraries for all of their hard work in getting ready and implementing Aleph ILL.

We have begun testing interlibrary loan requests with the ODIN (North Dakota) library network office. We are hopeful that we will be able to send interlibrary loan requests between MnPALS Aleph interlibrary loan libraries and North Dakota State University soon.

We have had phone meetings of the MnPALS Aleph Interlibrary loan libraries to discuss patron request forms, staff interface and functionality. Some of the changes are listed below.

Patron request form changes:

- Some of the changes were changing word User to User ID/Barcode, addition of help phrase 14 digits from library card/student ID on the blank ILL book and journal form.
- On forms change phrase "Until what date.." to "Not needed after".
- Change "Preferred Media" to "Preferred Format".

- Change the phrase "If you provide information about a part... to "If you provide information about a section or chapter the lender may be able to provide a copy."
- Change references to part to section/chapter.
- Addition of a confirmation phrase when a patron enters an ILL request.
- Removed the extra copyright confirmation on journal requests.

Staff Interface:

- Placed the cursor in the Request search box for borrowing and lending tab.
- Added Print option to numerous categories.
- On lending slip/pickslip added patron name and patron status for MnPALS ILL requests. We need a fix from Ex Libris to have this work across servers.

We are testing a fix for blank copyright file problem, patron initiated requests missing mandatory field that causes the title field to be cleared, Letters to Patrons appearing as email text instead of attachments, clearing out of additional records created by locates. As libraries have started to use ALEPH ILL we have been filing SI with Ex Libris for various issues that have been discovered.

Remember to clean-up your PALS message file. You will want to make sure you have closed down your interlibrary loan requests before the PALS server is shut-down.

Pioneerland Library System has begun using Fretwell-Downing VDX to process interlibrary loan requests.

Reference - Perry Madden

Web OPAC fixes from Ex Libris:

002459: When trying to place an ILL request as a guest, the login page is loaded and after a successful login, the "full" view page is reloaded so that there is no need to search again.

002460: The option to Renew ILL loans by patron has been added to the OPAC Library Card, ILL Total and Active Requests. This feature is only valid for sites that are using Web ILL module (external mode). There is a complementary fix in ILL.

002465: When displaying the ILL requests (active and total) from the library card of a patron, there was a wrong error message (0000). This has been corrected. The correction is only relevant for the Consortia (External) ILL.

002469: When a guest is trying to log in and place an ILL request, the ILL login page is loaded and then, after logging in, the document Full view page is automatically reloaded. The link for the ILL request in this page was wrong. This has been corrected.

002486: When the ITMH link type was used for the Full View in the Web OPAC, the collection code was displayed instead of the full collection name. This has been corrected.

002487: The "Back" button functionality has been changed in the Web OPAC Holdings page.

Until now, if the Holdings page was reached by clicking the link on the "Results List" page (Brief display), the "Back" button led to the "Full View of Record" page of the first record in the results set, which, in many cases, was different than the one whose link was used in the "Results List" page.

The functionality of the "Back" button on the right side of the Holdings page has been changed to

perform the same action as the web browser's "Back" button; i.e., get back to the previous web page.

002497: A fix to rep_change #002459 (When trying to place an ILL request as a guest, the login page is loaded and after a successful login, the "full" view page is reloaded so that there is no need to search again). Now the "full-set" page is loaded and not the "direct" page.

[Aleph Service Packs can be seen in the Aleph Secure Documents are or the PALS home page at <http://www.pals.msus.edu/aleph/syslibs/>]

Web OPAC Changes:

- New logical base requests (ALL LIBRARIES): If your library would like to change or create a new logical base that contains 2000 or fewer bib records, send the request to the PALSHELP eDesk. The process to create and reindex these small logical bases can be completed over a weekend in most cases.
- ILL links on Web OPAC: Based on the recommendations of several of our ILL testers, we are looking at moving the ILL link button from the top line of the header (which displays on all pages), to the Your Borrowing Record Screen (which will only come up when they log on to the system). We intend to leave the ILL link on the individual record page.
- Basic Search Page Examples: Just a reminder that Perry is changing the basic search page to allow the libraries to choose their own search examples. This is happening for now on a case-by-case basis as the libraries ask for the change. If your library would like to change its search examples, send the request to the PALSHelp eDesk.
- Advanced Search Page Format dropdown: Perry is also changing the choices in the Formats dropdown menu on the Advanced Search page. There have been a couple of glitches reported including a problem with the DVD format; it turns out the Aleph software has a problem with upper vs. lower case, and originally didn't properly recognize the format for DVD we had defined. We have fixed the DVD format, but it won't reflect that change unless the bib records are newly cataloged or edited after January 27. As of February 1, only about 220 of the 7000+ DVD records in MnPALS were being found with the DVD format limit. Perry has asked the MATF to recommend whether or not to temporarily remove the DVD format until April, when the full catalog will be reindexed.
 - Note: Each library has its own formats dropdown menu, so Perry has to make this change 63 (for each ADM) times, and then someone on the tech staff has to copy the changed files over to the production servers.
- Change from Chippewa to Ojibwa: Also on the Advanced Search Page, under the Languages dropdown, Perry is changing the label for the Chippewa language to Ojibwa. This change also must be made for each ADM, but at least the file is the same one as for the Formats menu, so Perry can do both at the same time.
- Eta Library Web OPAC Customization and Logical Bases: This process is now beginning, and the Eta libraries have sent in logos, logical base requests and other customization requests for their WebOPACs. It is expected that all web customization for the Eta Libraries will be completed when they switch to production during the week of April 24.
- Changes need to be made to the login pages on MnPALS to help identify what the user's barcode and password. There are 6 different login pages per Web OPAC, and 63 libraries.

MINITEX Library Webpage Terminology Survey:

Several MnPALS libraries participated in the Minitex Library Webpage Terminology Survey during January, including the Minnesota State Community and Technical Colleges (Detroit Lakes, Fergus Falls, Moorhead, Wadena), MN Department of Transportation, MN Department of Employment and Economic Development, Pollution Control Agency, MN State Law Library, MN Historical Society,

Ridgewater College (Hutchinson and Willmar), Riverland Community and Technical Colleges (Austin and Albert Lea), South Central College (Mankato and Faribault) and College of St. Benedict/St. John's University. The survey link was also on the Union Catalog Basic Search page and the opening page for WebPALS.

Minitex has stated that they will announce the results of the Survey at some point in the future. Watch <http://www.minitex.umn.edu/committees/standards/announcement.asp> for more information.

Serials - Dee Nolan

EBSCO ELECTRONIC CLAIMING

We are still doing some testing with EBSCO on the electronic claiming. We did receive a rep change from Ex Libris on the previously reported problem, but we think there is another problem with some missing BIB data.

Remember that in order to do electronic claiming, it is important that the Subscription ID number be in the Vendor Order Number field of the Subscription Record.

ROUTING PROBLEM

An incident has been sent to Ex Libris on some routing problems reported from our libraries. There have been situations reported where a serial record is set up to route, but when a predicted issue is arrived, it does not route the item. On the same title, the issue before might have worked correctly. Ex Libris is still reviewing this reported problem and has a status of Development on this problem. If any libraries notice a similar problem at your library, please report it to PALS edesk.

SERIAL CLAIM REPORT PROBLEM

An incident has also been sent to Ex Libris on the serial claim report, serial-04. In the report work form there is a Sort Output by option of Title or Vendor. No matter which option you choose, the report always sorts and prints by Vendor. Ex Libris has a status of Analysis on this problem.

Systems - Dan Honetschlager

Old Proxy server

The May '05 User Council directed "That the PALS office set a date no sooner than October 2005 by which libraries on the old proxy server software move to the new software". The PALS office purchased a couple of servers to handle LibProxy. The date selected for the discontinuance of the Old Proxy server was December 31, 2005. - Completed.

Aleph Staff Usernames/Passwords

Part of the conversion of Aleph 15.5 to Version 17 will involve combining the usernames of ALL institutions into one password file. The concern is for identical usernames from different institutions. Only the password of the first institution processed is retained, and the privileges of BOTH institutions are stored under the username. To prevent this from occurring during the conversion from 15.5 to 17, we are asking all to follow a new naming convention:

- ALL usernames should be created with the 3 digit Aleph institution code preceding the username. Leave usernames that begin with PALS#### - for PALS Staff access and usernames that begin with WWW-X used by the ILL process.

Advanced Aleph 15.5 Systems Training and Documentation

- Automating E-mailing and Printing of Notices in ALEPH

Documentation has been completed and tested at various sites. Documents will be available for ALL other sites at the Systems User Group Meeting.

- Label Printing in Aleph

Documentation and a recorded session are available to help you learn about Label Printing in Aleph. The document is available on the PALS Home Page at: <http://www.pals.msus.edu/pals/> Select Aleph Implementation, Aleph Secure Documents, under Functional Training Documents select System Librarians, Section 6b- Label Printing/UMD Print.

To access the recorded session, go the PALS WebMeeting website:

<http://connectus.pals.msus.edu> Click on VIEW PUBLIC RECORDINGS and choose the title "Label Printing" dated August 24, 2005.