

PALS

Support and Training Services Report MnPALS Consortium Fall User Groups October 11 & 12, 2007

TABLE OF CONTENTS

SUPPORT & TRAINING SERVICES	3
PALS SUPPORT CENTER TIP - WHAT DO STATUSES MEAN?	3
KNOWLEDGE BASE	4
EVALUATIONS AND SURVEYS	5
SITE VISITS AGAIN!.....	5
SLE TRAINING.....	5
ALEPH VERSION 17	5
ALEPH VERSION 18	6
WIKIS AND FORUMS	6
MNLINK GATEWAY	6
PALS SUBSYSTEM REPORTS	7
ACQUISITIONS/SERIALS	7
THREE NEW REPORTS	7
BINDING	8
CATALOGING	9
Work done by the PALS office.....	9
Work in progress by the PALS office.....	10
Knowledge Base Answers (New or Updated).....	11
CIRCULATION	12
INTERLIBRARY LOAN	13
Testing Aleph Web ILL with OCLC ILL	13
Testing Aleph Web ILL with VDX ILL	13
Added functionality	14
Patron Link Removal (ill-32)	15
REFERENCE	15
SYSTEMS.....	18

Support & Training Services

Support Trivia 2007

- Most popular week of the year to contact PALS: the third week of January, 2007 (just after upgrading to version 17).
- Most popular day of the week to contact PALS: Wednesday, for the third year in a row.
- Top two popular subjects to contact PALS about: Cataloging and Interlibrary Loan.
- Most popular hour of the day to contact PALS: 9:00-11:00 a.m.

PALS Support Center

You can link to the PALS Support Center at <http://pals.custhelp.com>. If you can't find what you need or you experience problems using the PALS Support Center, please call PALS at 507-389-2000.

For additional assistance using and tips for the PALS Support Center please consult:

- PALS Support Center Tips http://www.mnpals.org/main/Support_Center_Docs_Tips.html
- Do's for using the PALS Support Center http://www.mnpals.org/sections/Support_Center_Docs_Guidelines.html

If you have not received as timely a response to a support request as you anticipated please notify Cathy Colby at cathy.colby@mnsu.edu or call the PALS Support Center phone 507.389.2000 and ask for Cathy. Include the reference number of your request or have it handy if you phone.

- **Version 8 Upgrade** - PALS upgraded to version 8 of RightNow in May. There was no impact on the end-user interface during the upgrade. Only the staff client was affected in a positive way.
- **Changed Waiting Status** - The status of Waiting has been changed. When an incident status changes to **Waiting** it will now stay in this status for 10 days before moving to **Closed** Status. Incidents remain in closed status for 90 business days, which is what it was previously. During this 90 day period libraries can still update an incident, triggering the request to move back to **Updated** status and the Support Specialist it's assigned to will receive a notification of this. After the 90 day period the request is closed forever. After this point a new request would need to be created if the problem needed to be readdressed.

- **PALS Support Center Tip - What do Statuses mean?**

Below is a list of the statuses that you might see displayed on a request that you have sent to the PALS Support Center and what each means. When viewing a request you have sent to the Support Center through the web you will see the status displayed on the lower left side of the screen.

- **New** - Your request has just been sent and no response has been sent to you from the PALS Staff. Requests will stay in this status until action is taken by the PALS Staff.
- **Updated** - You have updated a request with additional information for the PALS Staff to take action on. Requests will stay in this status until action is taken by the PALS Staff or by the person sending the request.
- **Waiting** - PALS Staff have sent you a response and either need further information from you or if you are satisfied with the response you have received you can close the request. Requests will stay in this status for 10 days.
- **Completed** - Your request has been resolved in one of the following ways: 1) You have marked it completed, 2) PALS Staff have marked it completed, 3) It has passed the 10 day waiting for a response period and is automatically marked closed. Requests in this status can be reopened for 90 business days.

- **Sent to Vendor** - PALS Staff has contacted a vendor regarding your problem and is waiting for a response.
- **Enhancement Request** - Your request has been identified as something that needs an enhancement to the software for resolution.
- **Technical Review** - A Support Specialist has sent your request over to technical services for either further review or action.

- **Knowledge Base**

Support Specialists continue to add answers to the Knowledge Base as well as update existing answers. Please take advantage of the new knowledge that is added regularly.

We have done some tweaking to the way the knowledge base searches and returns suggested answers when you send in a question. Take the time to check some of them out. It may well be that one of those answers contains the information you want.

Please review the list below of Answer ID and Summaries that have been added or updated since last April in the PALS Support Center Knowledge Base:

Number	Knowledge Base Answer
2252	Duplicate a record from another MnPALS library
2281	CCL search on logical base top out at 1000?
2321	XML/XSL parse errors
2337	Duplicate lines of Location/Available in Web OPAC
2343	Overlaying brief bibliographic record with OCLC Fully cataloged record
2407	Batch deletion of bibliographic records
2455	Setting up Bases for Search in ALEPH client
2991	Emailing and Printing Notices
3062	Aleph External Information Sources
3081	Not able to log on
3118	Summary Holdings Documentation
3119	PST field on a bibliographic record definition?
3120	Subscription and Cost Information for RCLWeb
3121	Searching the Authority File in the web OPAC
3122	z39.50 Gate for the GUI Client
3124	Manage_70 service
3125	Remove Patron IDs cir-32 Service
3126	Breaking links between item record and order no.
3127	Predicting Issues on a Seasonal Quarterly Title Beginning with the Winter Issue.
3138	Authority record shows up in OPAC
3139	Canceling Orders
3140	Change screen color in windows of Circulation module
3141	Titles per Budget Spent (mnpals-28) Report
3142	Titles with Claims (mnpals-30) Report
3147	Shelf List Report (item-05) missing items
3151	Browse Call Number Displays only Class Number and Title
3154	Shelf Reading Report Missing Items
3155	Issues Arrival Statistics vs. List of Serial Titles
3156	Budget Rollover Process
3157	Titles never loaned (mnpals-22)

Number	Knowledge Base Answer
3158	Items not linked to Holdings Records (mnpals-23)
3159	Non-deleted ADM docs that have links (mnpals-24)
3160	Titles in a collection (mnpals-27)
3161	BIBS with multiple Holdings (mnpals-32)
3164	Automatically add NUC to Holding Record
3165	Item record linked to wrong bibliographic record
3167	Material type causing duplicate lines of loc/avail. in WebOPAC
3168	Logical bases definitions (tab_base.eng)
3169	Global Changes to Remove Item Process Status
3170	Circulation Logger Clean Up Service cir-78
3171	Locating Report in Scratch Directory
3172	OCLC Port number
3173	Filtering Profiles on Global Patron Information Window
3174	Include BIB/HOL data
3175	URL Checking Service (print-11)
3176	Subscription Number in Manually Created Item Record
3177	Arriving Serials in the Cataloging Module
3178	Batch Load limit 25 for OCLC Export
3179	Total number of bibliographic records
3181	Prediction Pattern Information
3182	System Down
3183	Emailing messages via the Print or Send
3184	"Library Has" field
3185	Stop claiming serial order
3186	Stop serial issue from being claimed
3187	Statistics in the Item Record
3188	Setting foreground or background colors in Aleph
3189	mnpals-39 - Bibs without Titles
3190	mnpals-37 -Retrieve CALL_NO_KEYS from Entering Range of Barcode
3191	mnpals-32 - Bibs with many Holding

Evaluations and Surveys

Evaluations to follow-up on Fall User Groups will be sent out electronically to MnPALS library staff. Please watch for the announcement following User Group.

Support Reports available monthly

Support and Training Services Reports are published on almost a monthly basis. Please check the following link on the PALS homepage for these reports

http://www.mnpals.org/sections/News_Supprt_Reports.html.

Site Visits Again!

The PALS Support Specialists are beginning to do site visits again. We have been waiting a long time to get back to this practice and are really pleased to do so. Dan Honetschlager made our first site visit to Pine Technical College September 18 and 19.

Training and Workshop Schedule

- Acquisitions Module Aleph Version 17 In-Person Training, September 26-27.
- Serials Module Aleph Version 17 In-Person Training, September 19-20.
- Check out the following link from the PALS homepage for a full listing of training offerings and links to registration forms http://www.abcsignup.com/view/view_month.asp?as=16&wp=112&aid=PALS.
- Individual invitations will be sent out each time we add a new session to our offerings.
- Customized Training or Training for adding a new module of Aleph to your library is available upon request. Please contact the PALS Support Center <http://pals.custhelp.com>.

Conference, Training, Workshops attended

PALS Support Staff continues to be involved in the library community locally and nationally. Watch for Support Staff at meetings and events such as MnSCU Librarian Day, MLA, ARLD, ALA, ELUNA and others during the following year.

- **SLE Training** - PALS signed a contract with InSync Training to provide delivery of the Synchronous Learning Expert Certification program starting May 10 to PALS Support Specialists. This nationally recognized, multi-certificate program from InSync Training is teaching us how to design and facilitate live online training that maximizes engagement, collaboration and learning. Adobe Connect is being used to provide the training to us so that we can actually learn in the environment we currently plan to deliver our training in. We have completed the Synchronous Facilitation program and have all but the final project completed for the Synchronous Design. The Capstone program will wait now until February.

Task Forces and Working Groups

PALS Support Staff is involved with our libraries in several task forces, study groups and committees. The following is a list that Support Staff is currently involved with:

- Authorities Task Force - Mary Ann Greenwald
- Indexing Task Force - Mary Ann Greenwald
- MnPALS Access Task Force - Perry Madden
- Marketing Task Force - Cathy Colby
- MINITEX/MnLINK ILL Committee - Susan Dueis
- MnLINK Gateway Operations Committee - Susan Dueis
- Consortium of MnPALS Libraries User Council - Sonja Eilertson

Aleph Version 17

- **Summary Holdings and exporting local holding records to OCLC** - Four test libraries are being used:

two libraries (Alexandria Technical College and Northland Community & Technical College/East Grand Forks campus) not using the Serials Module, but manually maintaining the seriality on the item record and two libraries (Inver Hills Community College and Minnesota State University/Mankato) using the Serials module. The holdings to be sent to OCLC for serial titles from Alexandria Technical College and Northland Community & Technical College/East Grand Forks campus have been identified by the respective librarians. OCLC has just (9/7/07) sent us the content needed in Holding Record tag fields. Now, the test library holding records can be edited. Once that work has been completed, PALS plans to send a test file to OCLC. From that test file, we will be able to determine what is missing or that it is correct.

- **Inventory Services** - Testing has been done on the Lute, development server, with St. John's University/College of St. Benedict's. This testing was in regard to Aleph's version 17 inventory marking feature and four new services; e.g. item-01 to determine a range upon which to perform the inventory, item-08 is used for a batch process, item-09 is used to set a process status on "missing" items, and item-10 produces a summary report upon completion. Additionally, a procedural document will be written and shared with MnPALS libraries.

Aleph Version 18

Trainers have been looking at all available documentation for version 18 and are anxious to have it installed to begin working with. The initial feeling is that training for the version 18 upgrade will be fairly uncomplicated. The current thought is to offer multiple one hour online training sessions on each module to cover the new features. Watch for training announcements later this fall.

Wikis and Forums

PALS has put in place both a Wiki <http://wiki.mnpals.org> and a Forum <http://forums.mnpals.org> software. The Forum is being piloted with the MnPALS Access Task Force and the Wiki was used for User Group Planning. Both have been well received by the groups that have used them. The Indexing Task Force has also started to use the Forum software. Conversion of documents from the FuseTalk boards to SMF Forum boards has been done manually. Check out the demonstration of both the MnPALS Wiki and Forum softwares during the General Session on the second day of the MnPALS User Group.

Questions?

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

MnLINK Gateway - Susan Dueis

Working on information shared at the MnLINK Gateway Operations Committee meeting, the Indexing Task Force is exploring indexing changes to better accommodate the Item Format filter for audiovisual material in ZPORTAL searching.

Martin Luther College in New Ulm now has their collection searchable on the MnLINK Gateway. They loaded their records on the Traverse des Sioux Sirsi server.

MnLINK/MINITEX has revised the MnLINK brochure, which was distributed at the State Fair. The electronic version of the brochure is available at <http://www.minitex.umn.edu/mnlink/promote/brochure.pdf>

In May, we got functionality in the MnLINK Gateway to be able to put up a "Message of the Day" (MOTD) and remove the "Get It" button for individual MnPALS libraries when they want to temporarily suspend

ILL activity in Aleph for a period of time. A couple libraries took advantage of this functionality this summer.

At the OCLC PICA User Group meeting at ALA, there was an update on ZPORTAL/VDX products and their role within the OCLC software environment. The VDX ILL component's future is "secure", but ZPORTAL's future is "questionable" after version 2008 (early 2009 release). There will likely be some other discovery tool to take its place—something more "customizable and universal".

PALS Subsystem Reports

Acquisitions/Serials - Dee Nolan

EDI ORDERING

We have four EDI vendors set up on Aleph in version 17 for book ordering. The four vendors are Baker and Taylor, Midwest Library Service, Blackwell Book Services, and Yankee Book Peddler Library Services.

MSU Mankato is using Blackwell's Book Services Collection Manager.

We have begun preliminary conversations with YBP and St. John's University/College of St. Benedict's on the GOBI product.

If any libraries are interested in using any of these vendors, please contact MnPALS Support.

BAKER AND TAYLOR ONLINE CUSTOMER SUPPORT

Baker and Taylor has a free online customer support system. If you go to www.btol.com, you will see a box regarding Online Customer Support Service at your fingertips. The BTOL customer support system allows libraries to view their account and check on orders and invoices. Libraries need to register for this service. FYI: Baker and Taylor kicks out orders that are missing an ISBN or have an incorrect ISBN.

THREE NEW REPORTS

Titles per Budget Spent Report (mnpals-28)

This report prints a list of all orders for which the selected budget has been paid.

The report is grouped by object code. There is a subtotal for each object code and a grand total for all object codes. This report lists the object code, budget, price, order number, and title of all paid transactions for the selected budget.

This report can be found in the Aleph Acquisitions/Serials module, Services, Budget Management, and then Titles per Budget Spent (mnpals-28).

Titles with Claims Report (mnpals-30)

This report was requested at the Acquisitions/Serials Spring 2007 User Group Meeting. The report prints a list of all Serial issues that have arrived, but at one time were claimed based on the selected date range. The purpose of the report is to give libraries information on past claims.

The report is sorted by BIB Number (Aleph system number). This report lists the bib number, title, barcode of the item, description of the item, and the order number.

This report can be found in the Aleph Acquisitions/Serials module, Services, Serials, and then Titles with Claims (mnpals-30).

Issue titles that have been browsed (mnpals-36)

This report was requested by Serials staff, but because it has to do with browse statistics it is housed in the circulation module. The report lists Serial titles by collection that have been browsed based on the date range chosen in the report. The report is sorted by title. The report lists the title, item status, collection, ISSN, and count. The count is pulled from two statuses, In House Use and Not Loan Return.

This report can be found in the Aleph Circulation, Services, Items, and then Issue titles that have been browsed (mnpals-36)

BINDING

A message was sent to the MnPALS libraries in July to find out if there was an interest in using the Binding process in Aleph. Version 17 of Aleph has some new features available to help with the binding process. Five libraries responded that they would be interested in receiving some training on the binding process. This has been added to the work plan.

NEW LIBRARIES

We welcome Minnesota School of Business/Globe College to the Serials module. They were trained on Serials in September.

We also welcome two new libraries to the Acquisitions module. Minnesota State Law Library and Hennepin Technical College, both Brooklyn Park campus and Eden Prairie campus were trained in September.

OUTSTANDING ACQUISITION/SERIAL PROBLEMS WITH EX LIBRIS

SI 8192-37360 Print info from Order Record

In Acquisitions when doing a Print from an order and then choosing Print Record Information Only, the Arrival Status and Invoice Status does not always print accurately.

SI 8192-37450 Collection Manager Vendor Discount

SI 8192-49054 Encumbrances for file-96

Both of these SI's are related to using Collection Manager from Blackwell's. If no vendor discount is used, the order encumbers correctly. If a vendor discount is used, the order does not encumber.

PALS believes that the error routine is checking the wrong field when comparing prices: It should be checking the estimated list price in the z601 table instead of the estimated price because the estimated price has the discount calculated; therefore, the original sum in the order record does not equal. Hence, the budget is not in the order record either since an encumbrance is not created.

SI 8192-36883 Filtering Vendor List

We are unable to filter the vendor list based on a tier vendor record. The only way to sort the vendor list is by using the TAB4 of the vendor form.

SI 8192-47957 EDI for Order Only Checkbox

We are using a tiered vendor record system and want to be able to prevent EDI claiming when doing EDI ordering in the tiered vendor records. We have tried to check the new "EDI for Order Only" box in the

tiered vendor record, but it does not stay checked unless the box is also checked in the Global Vendor record.

ANSWER BOOK

Several new answers have been added to the answer book. The following is one important reminder.

If you are using the Serials module and you want to manually create an item it is important that on TAB4 of the item form the Subscription Number is entered. Generally this is going to be a 1 for subscription one. This is something that happens automatically on items that are created through the 853 and 853X. If you manually create items or duplicate items you have to be careful to make sure that 1 is in that field so that the item is connected to the subscription. Answer 3177

Cataloging - Mary Ann Greenwald

1. Work done by the PALS office [asterisk (*) denotes from the PALS Office work plan.]

a) * **Course Reserve indexes in the Web OPAC.** When in the Web OPAC's Course Reserve Library logical base, these indexes have been added to the Advanced Search dropdown menus. The indexes are: Anywhere in Record, Course Name, Course Number, Period, Instructor, Department, Title, Authors, Subjects, Series, Format, Sublibrary, Year, Course Reserve Bib Number, LC Number, ISBN, ISSN, Source Record ID.

b) * **Investigate exporting bib records from MnPALS to OCLC.** This has been completed with Minnesota State Community and Technical College/Moorhead (MSCTC). See whitepaper report attached to this (October 11, 2007) Cataloging Group Agenda No. 7.a.

c) * **Implement version 17 Inventory Management.** St. John's University/College of St. Benedict's tested this functionality over the summer months. **Please see their attached report.**

d) Reports from the GUI Client Cataloging Module with a HELP for each workflow.

i) item-01 (inventory definition); item-08 (inventory marking); item-09 (inventory summary); item-10 (inventory report); mnpals-37 (retrieve call no. keys from entering barcodes). NOTE: All these services are used with Inventory Management in version 17

ii) mnpals-22 ("Titles never loaned" - titles in your catalog with zero '0' loans by publication year range. KB #3157

iii) mnpals-23 ("Items not linked to Holding records"). KB #3158

iv) mnpals-24 ("non-deleted ADM docs that don't have links"). KB #3159

v) mnpals-27 ("Titles in a Collection" for a specific call number range). KB #3160

vi) mnpals-32 ("BIBS with many Holdings" has a count of the number of Holding records for a BIB). KB #3191

vii) mnpals-37 ("Retrieve Call_no_keys from entering range of barcodes") Provides the call numbers as they are seen in the Oracle Table. This is used with item-01 for Inventory Definition. KB #3190

viii) mnpals-39 ("BIBS without titles" provides a list of Bib record Aleph System numbers that do *not* have titles in the bib record). KB #3189

e) **Loaded netLibrary records for a variety of MnPALS libraries.** Refer to the PALS Technical Services Report.

f) **item-05 Shelf List report.** EXCLUDED now works. This has been fixed by Ex Libris.

g) **Shared collection set of netLibrary records with 049 \$a MIIL.** Purchasing a shared collection set of netLibrary records will always require the 049 \$a MIIL. This will be no issue when PALS loads the records since the two loading processes used will by-pass the 049 code. It will be an issue if the library chooses to load the file via the Connexion Client Import feature and then export to Aleph.

The Aleph oclc_loader reads tab_z30 where holding codes must be entered. The holding code MIIL cannot be entered multiple times for all libraries, since the loader will read it the first time it hits the code and load the records only to that library.

2. Work in progress by the PALS office - [asterisk (*) denotes from the PALS Office work plan.]

a) * STatus field in Course Reserve bib records. In Course Reserve Bib Record, add STATUS field choices. STA \$a SUPPRESSED functionality should work in the Web OPAC.

b) * CORRECT feature denied for all PALS Usernames. The CORRECT feature cannot be used in our consortial environment. If anyone uses CORRECT it corrects all the records in SYS01 and puts that librarian's username on all the records that have been corrected. The CORRECT Subject Headings feature is turned off or on by username privileges. PALS cannot deny username privileges. These are set by individual libraries. Libraries are *reminded* to turn this off. Of note, some PALS usernames (for example: PALS101) in a libraries' list of staff privileges had the feature turned off and some had it on. Since libraries often copy these privileges, libraries are URGED to check that the privilege is turned OFF. PALS is in the process of correcting all the PALS usernames to deny this privilege.

c) * PALS will identify bib records that have another library password and the cataloger level. PALS has identified there are 18,000+ records in SYS01 that have another library password. At this point PALS has no plan to cleanup all these records until (b) above is adhered to. The problem will continue to exist if anyone has CORRECT turned on. PALS recommends that libraries notify the PALS Support Center when they have a record that cannot be edited, so that the PALS office can clear the record.

d) * Test load summary holdings to OCLC. With version 17, summary holdings display is working. PALS would like to send a libraries' test file to OCLC. The following libraries were identified as test libraries: Alexandria Technical College, Northland Community and Technical College/East Grand Forks campus, Inver Hills Community College, and MN State University/Mankato. The PALS office had been in communication with MINITEX various times to determine the correct tagfields to include in the exported holding record. MINITEX had been waiting for a response from OCLC, which finally came on September 7, 2007. At this point, the summer window of opportunity for PALS to work on the project has disappeared. PALS now must work on moving to version 18. Nevertheless, this remains on the work plan with the PALS office hoping to fit this project into a workspace slot.

e) * Work with Cataloging User Group Steering Committee. Work with the group on Aleph cataloging issues: e.g. fix-routines, expand routines.

f) * Test batch service for Delete Item Records (item-11). The job enables batch deletion of items and handles item deletion consequences, such as notifying that a hold or booking request will not be fulfilled. This has not been tested in the PALS office. Has any library tested this?

g) * Investigate bib loaders for multi-ADM environment. The MARCIVE bib loader continues to be problematic for Ex Libris.

h) * Global change to remove 'x' from 852 \$h in HOL records. Reported to Cataloger User Group in April 2007. 100,000+ records have 'x' as call number. This relates back to past PALS practice by libraries where 'x' placed in 090 field would create call number suppression. This suppression functionality does not exist in Aleph, so the 'x' is appearing as a call number. No timeframe set to do a global remove.

i) * version 18: test authority file processing

j) * Remove SYS60 pattern prediction templates and place on website

k) * version 19: Course Reserve modifications and need for ADAM

l) * Help on Field Tag information for OCLC fields. Cataloging User Group needs to identify wording. The previous work plan said Validation Work Group would work on this. PALS does not remember receiving instructions to do this.

m) * **Remove SYS60 pattern prediction templates.** Can we remove these now? Have libraries had the opportunity to test them?

3) **Ver.18 changes** - refer to PALS Executive Director report

4) **ELUNA report** - refer to PALS Executive Director report

5) Knowledge Base Answers (New or Updated)

- a) 3119 - PST field on a bibliographic record definition
- b) 3127 - Predicting issues on a seasonal quarterly title beginning with the winter issue.
- c) 3147 - Shelf List Report (item-05) missing items
- d) 3151 - Browse call number displays only class number and title
- e) 3164 - automatically add NUC to Holding record
- f) 3165 - item record linked to wrong bibliographic record
- g) 3167 - material type causing duplication lines of loc/available in Web OPAC
- h) 3169 - global changes to remove item process status
- i) 3171 - locating report in scratch directory
- j) 3172 - OCLC port number
- k) 3174 - include BIB/HOL data
- l) 3175 - URL checking service (print-11)
- m) 3177 - arriving serials in the Cataloging module
- n) 3178 - batch load limit 25 for OCLC export
- o) 3183 - emailing messages via the Print or Send

6) Open Support Incidents (SI's) with Ex Libris. (These apply to Cataloging or Items)

- a) 8192-48824 - Why are (3) 852's displayed for one location?
- b) 8192-15707 - MARCIVE loader problems with multiple 049 and not de-duping records
- c) 8192-50907 - browse entries with large results sets do not retrieve
- d) 8192-51696 - using the OCLC loader that has two 049 shelflist codes in the records
- e) 8192-51896 - number of loans on an item (sent to development)
- f) 8192-86620 - Lag time on showing electronic records in GUI Client/Cataloging Module/Search
- g) 8192-80393 - p_item_01 does not work if '!' or '"' symbol is in z30_call_no_key
- h) 8192-56040 - Result sets with records that do not belong to logical base.

7) Rep changes (fixes) to version 17. (NOTE: Do a version check in the Cataloging Module/Aleph dropdown/version check to get the GUI client updates).

a) 1063 - Preview publication schedule of the Cataloging module - when using omit days in the publication patterns (853 \$y), the preview screen was not loaded in several cases. This has been corrected.

b) 1070 - 1) suppressed HOL records are not displayed and 2) items which have an item process status that is set to 'N' in tab15/col. 10 do not create an AVA field.

c) 1071 - GUI display problems with right-to-left languages, has been corrected.

d) 1075 - in continuation of rep change #1035, the program fix_doc_new_aut_6 was changed in order to remove the full stop (".") before the colon when creating the 670 field (Source Data Found) in the authority record.

e) 1079 - the Z103 sorting routine "fix_z103_sort_lkr_doc_no" (used in tab_fix_z103) did not work properly. This has been corrected. Cataloging/Records Tab/lower navigation pane: the HOL record attached to the BIB record, listed under the HOL library, were not sorted according to document number.

f) 1080 - in the cataloging module, the staff user with the cataloger proxy was not working correctly when adding/updating a record. The user with cataloger proxy was not allowed to add/update a record with an OWN field, although the catalog proxy had permission for that OWN code. This has been corrected.

g) 1082 - the inventory definition (item-01) service only updated up to 19999 items. This has been corrected and now there is no limit on the number of items that can be updated.

h) 1089 -when converting a record from MARC to Aleph sequential in file-02 or union-03 (used by PALS Tech Services), long fields (records over 2000 characters) were split where two dashes "- -" were found. In the absence of two dashes "- -" the lines were often split in the middle of a word. This has been corrected and now the lines are split at the end of a sentence.

Circulation - Susan Dueis

Aleph Circulation Issues

- PLIF update:

A message was sent to the list on September 21, explaining about the issues we have been having with PLIF data loads.

We have been working with ISRS to correct an issue that causes faculty/staff data to come in as "student" and get assigned student parameters. ISRS put a fix in the data loads to include a field to differentiate faculty/staff from students. In order to implement that change, we needed to change the script that handles the PLIF data loads. Unfortunately, there was a bug in the script which caused all patrons to be elevated to staff level, even students.

To correct this, we moved everyone whose Aleph Z305 records had recently been updated back down to student level. Then September 19, faculty/staff data came through from ISRS again, to elevate faculty/staff back to staff level. This did cause some issues for non-MnSCU and/or non-PLIF libraries, most of which have been identified.

We also had a parallel issue that faculty/staff data was not being sent by ISRS for a period of time. Once ISRS fixed their scripts, they resent the faculty/staff data, which was refreshed in Aleph. However, we did not get barcodes with this faculty/staff data, as we had been told we would.

On September 25, ISRS sent us a file of faculty/staff barcode data that had been updated since August 21. That was as far back as ISRS could pull data.

From now on, we should be able to distinguish faculty/staff records from student records. We also have switched to getting refreshes of faculty/staff data daily, instead of weekly.

- We still have NOT been running the p-cir-77 service to delete patron records. As reported before, we believe a rep change broke the patron record deletion functionality in the p-cir-77 service. We have been working with Ex Libris to resolve this issue, so that we can run the service in the SYS50 and delete expired patron records for ALL ADM's, but not delete those patron records that still have activity in any other ADM. However, at this point, Ex Libris is requesting that we wait until upgrading to version 18 to test.
- We are continuing to work on the cash transaction link to the business office, as time allows.

- The Reports Task Force requested a new report that lists Serial titles by collection that have been browsed. It is called "Issue titles that have been browsed (mnpals-36)" and can be found in Aleph Circulation>Services>Items. More information about this report is in the Serials section of the Support and Training Services Report.
- Recent answers added to the Knowledge Base (go to the PALS Support Center at <http://pals.custhelp.com/> to view):
 - 3125 Remove Patron IDs cir-32 Service
 - 3140 Change screen color in windows of Circulation module
 - 3170 Circulation Logger Clean Up Service cir-78
 - 3173 Filtering Profiles on Global Patron Information Window
 - 3187 Statistics in the Item record

Interlibrary Loan - Sonja Eilertson

Testing Aleph Web ILL with OCLC ILL

We tested Aleph Web ILL with OCLC ILL using Simple ILL. We were able to complete an interlibrary loan cycle when Aleph was the borrowing/requesting library sending a request to OCLC. When OCLC ILL was the borrowing/requesting library we were not able to complete the interlibrary loan cycle because of a problem with aliases and user id and password not being sent in the APDU.

We have reported these issues to Ex Libris and are waiting for a response.

(An alias allows an ILL symbol, such as TSTI, to identify its other names. Aliases for TSTI, may be tsti or mnpalststi.)

OCLC Direct request

We sent specifications on OCLC Direct Request to Ex Libris.

We have heard that other sites are asking for Direct Request. It may be a development item for version 20.

Testing Aleph Web ILL with VDX ILL

We tested Aleph and VDX ILL with the MnLINK office. VDX is the interlibrary loan software used by regional public library systems and CLIC libraries. We ran into two issues case sensitivity and aliases. In Aleph we can accept any casing, but it must match the casing we have for an ILL symbol. In VDX they store their ILL symbols in upper case. Our ILL symbols have mixed casing. This means that we can get partially through an ILL cycle. We think when Ex Libris fixes the alias problem we may be able to work around the casing issue. We have submitted SI with Ex Libris on the alias and casing issues.

Follow-up from Spring 2007 ILL User Group Meeting

Added Edition, Series, Issue Month and Issue Day to New Line

As requested at the Spring Meeting added Edition, Series, Issue Month and Issue Day to the New Line list. Issue Month and Issue Day will appear as Issue Designation fields.

Remember if you want the other library to get the additional field that you must add the field before sending the request to the other library.

Subject lines for ILL letters

At the Spring ILL User Group Meeting we discussed the problem that subject lines for ILL Letters to Patron are often incorrect. At the meeting, we decided to move to a common subject line until a fix is received from Ex Libris. Mike has changed the subject line for ILL Letters to Patron to Inter-Library Loan Notice. He did make a copy of your library's tab_form_description.eng so when a fix is received from Ex Libris you can revert to your own subject lines for ILL Letters to Patrons. We are still having reports of ILL letters with incorrect subject lines because of memory buffer issues. We believe the change to a single subject line has lessened the number of times an incorrect subject line appears on an ILL letter; it has not eliminated it.

Lending Overdue service (ill30) setup to run for all MnPALS ILL units

At the Spring 2007 Circulation-ILL User Group Meeting a resolution was passed that the ILL Lending Overdue service (ill30) should be setup to run daily for each ILL unit on the MnPALS server.

The Lending Library Overdue service (ill30) is setup to run Monday through Friday for each ILL unit.

Added functionality

We have added Recall as an option for lending requests in lending Overdue category.

Print function was added to the Borrowing request Display list. Mike added the Print function so you can now select interlibrary loan requests from the Display (upper) pane and produce a print file. You can also select and print an individual request from the Display list.

EBSCO linking available

You can setup EBSCO so a patron's article request will transfer into Aleph Web ILL for you to handle. You will need to contact EBSCO to setup this request transfer. When you contact EBSCO you will need to provide them with the URL address and your MnPALS ILL code.

Clear lending banner/bulk Check-in

There was a request to add a clear button to the banner bar in order to remove the ILL request number from the Check-in. It was discovered if you click on the banner/bulk Check-in again the ILL request number is removed from the Check-in form.

ADMIN tab

Potential supplier and bases were reviewed for consistency. The delivery code of the ILL unit was placed behind the ILL unit name.

Lending add Mediated and Printed category

With the move to integrated ILL in version 18, we will look at the possibility of adding a Mediated and Printed category.

Try out sort "Last Activity Date"

You may want to try out the sorting requests by "Last Activity Date". The "Last Activity Date" is the date that a request was last updated by either the borrowing or lending library.

Reports

ILL Loans without ILL item records

We have a new report - ILL Loans without ILL item records, this report will find loans for ILL requests that the item record for the interlibrary loan request has been deleted.

These lingering ILL loans are caused by problems with X-services where the borrowing library Return will remove the item record for the ILL request, but leave the loan on the patron record. This report will help you find those patron records that have a loan for an ILL item where the item record has been removed or deleted.

Patron Link Removal (ill-32)

The ILL "Patron Link Removal (ill-32)" will remove patron name, barcode and email address from interlibrary loan requests that have a status of Canceled, Closed, Expired and Deleted. When you run the report you will set the number of days to keep patron information in completed interlibrary loan requests.

If you have not run the "Patron Link Removal (ill-32) in Aleph Web ILL you will need to slowly decrease the number of days to keep patron information. You will want to start with 365 days and run the service and let it complete. You will know it is complete when you see the report. Then run the service again and decrease the number of days by 50 so you would run the service for 315 days and wait for the service to complete. Continue to decrease the number of days until you reach your typical number of days to keep patron information in your interlibrary loan requests and in the patron's Your Borrowing Record.

Each time you run this service it will create a report. You may want to delete the report so you don't have the deleted patron information in a handy report.

Once you have run the service and reached your typical Number of days to keep patron information in your ILL requests, we can set this up to run from your ILL job list. You will need to tell us the number of days. We will run it once a week for your ILL unit. You may want to delete the report created by the service. (Reports and slips created in interlibrary loan are automatically cleared after they are thirty days old. This is done once a week.)

Reference - Perry Madden

Web OPAC Changes from Version 17 Service Packs:

- Change Number: 001012

Description: A new doc expand for the availability of PRIMO has been added, expand_doc_bib_avail. It adds new fields with the code "AVA " to the BIB record (a field per sub-library). This development is optional see implementation notes to update the change. This development adds new fields with the code "AVA " to the BIB record (a field per sub-library) with the following information in subfields:

- \$\$a ADM code.
- \$\$b sublibrary code.
- \$\$c collection name.
- \$\$d call number.
- \$\$e availability status.
- \$\$f number of items.

- \$\$g number of unavailable loans.
- \$\$h multi-volume flag (Y/N).
- \$\$i number of loans.
- \$\$j collection code.

- Change Number: 001013

Description: A new development for PRIMO In X-service - "publish-avail". The service accepts as an input documents system numbers and BIB library; it returns the documents with an enrichment of availability information (the "AVA " fields) as generated by expand_doc_bib_avail.

- Change Number: 001020

Description: In the Web OPAC, items with Z30_CHRONOLOGICAL_I such as 2005/2006 or 2005-2006 were not displayed when clicking on the link "ITM2" in the "Full View" page of a BIB record. This has been corrected.

- Change Number: 001031

Description: My e-Shelf - Additional fixes related to CJK Folder names.

- Change Number: 001049

Description: The expand program expand_doc_bib_hol was taking information from the HOL record and added it to the BIB record even if the HOL record was deleted or suppressed. This has been changed so now the HOL information is not expanded if the HOL record is deleted or suppressed.

- Change Number: 001070

Description: A New development for the program expand_doc_bib_avail - (1) Suppressed HOL records are not displayed and (2) Items which have an item process status that is set to "N" in tab15/col. 10 do not create an AVA field.

Other Web OPAC Changes

Phrase Searching Using Quotes

After the reindexing that took place in June, we were able to get the Phrase Searching using double quotes to work once again. Search examples on the Basic and Advanced Search pages were changed back to reflect using the double quotes as well.

Availability

Our tech staff adapted some new functionality that Ex Libris put into version 17 in preparation for integrating Primo. Aleph now creates an "Availability Status" that was incorporated into the Web OPAC. On each of the local web OPACs, we have replaced the Library (Owned/Out) column of the Brief list display with an Available column.

From what we have been able to tell, the system will say one of three things: available, unavailable or check_holdings (if some items are checked out/not available and some items are available).

After installing a Service Pack in September, PALS received reports of problems with the Availability Status not appearing for items with suppressed holdings. This was in fact due to one of the new fixes, 1070, which states:

Change Number: 001070

Description: A New development for the program expand_doc_bib_avail - (1) Suppressed HOL records are not displayed and (2) Items which have an item process status that is set to "N" in tab15/col. 10 do not create an AVA field.

This is a problem for our users who have netLibrary records, because we have been recommending they suppress the barcodes (holdings) for these records, so now no availability is displaying.

What to do about Union View?

Unfortunately, this functionality will not work on the Union Catalog. What we have found is it will only report the availability status of the preferred record, and not any of the other records.

New Version 18 Web OPAC Features

- Please see the Aleph Update for detailed information.

Item Process Status Votes: Round 1 Results (RS/DI)

BACKGROUND

Item process statuses are defined in tab15.eng and are used for Acquisitions, Circulation and other processing statuses, things like Binding, On Display, etc.

Currently, all Item Process Statuses will display as Unavailable, unless the PALS Staff specifically change that Status to display as Available.

Back on August 29, a message went out to the PALS mailing lists requesting a vote on whether libraries wanted the RS and DI Item Process Statuses changed so that they displayed as Available, rather than Unavailable in your local library catalog.

RESULTS

RS: 26 libraries total, 7 Votes YES, 2 Votes NO, 17 Non-Votes: FAILED

DI: 43 libraries total, 11 Votes YES, 1 Vote NO, 31 Non-Votes: FAILED

FOLLOW UP

Each library that voted YES above was contacted via the PALS Support Center. They were asked to make changes to the Item Process Status in their tab15.eng and pc_tab_exp_field.eng tables from RS to RY and/or DI to DY.

Once the libraries have confirmed that they have made the change to the above tables, the PALS Tech Staff changed the RY and DY Item Process Statuses in tab_expand to Available.

The PALS Tech Staff also did a global change to change to items assigned the old item process status to the new item process status for the affected libraries.

ITEM PROCESS STATUS: NI

One library asked for their Item Process Status NI to be changed to Available. Since they were the only library using that Item Process Status, we have changed that Item Process Status to display as Available.

NEXT VOTE

If a library requests that one of their Item Process Statuses be changed to Available (by sending a request to the PALS Support Center <http://pals.custhelp.com/>), the PALS staff will consult the list of Item Process Statuses we created to see which other libraries are using that Item Process Status. An email will be sent to the PALS mailing list (mnscu-pals@WWW.pals.msus.edu) asking that the libraries using that particular process status vote on whether they want that Item Process Status changed to Available.

In the future, we will give at least 10 working days for the local library staff to meet to determine how they wish to vote.

As always, if you have suggestions on how to improve this process, please let Perry Madden know.

Systems - Dan Honetschlager

Proxy Services

PALS does intend to incorporate EZProxy as an alternative and eventual replacement for LibProxy. We have purchased a license for EZProxy as well as two new servers that we will use to run LibProxy and for testing and running EZProxy. Moving forward on new Proxy Services work is on hold until we have completed the set-up of our new servers for Aleph (mid to late October).

Depcon Unplugged

In August, Depcon (report transfer tool) was decommissioned. Dan gleefully unplugged it. Paul happily wiped the hard-drives and surplused the empty shell.

Emailing and Printing Notices

New instructions have been written to assist you in configuring the Aleph program to email notices in version 17. This process will email notices that contain an email addresses and print notices that do not have an email address in the record. Please see **answer number 2991** from the PALS Support Center <http://pals.custhelp.com> for details.

System Slowdown

As reported at the Spring 2007 User Group Meetings, "the Aleph system has been experiencing slow-down due to a couple of issues, internet resources and system resources." The MnSCU System has upgraded the internet line from Mankato to the U of M. Replacing the previous shared 120meg capacity line with an individual 1000meg capacity line, upgrading the server hardware and office switches all contributed to fewer calls related to slow or no response.