



PALS Report

Consortium of MnPALS Libraries

User Group Meeting

October 28, 2009

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PALS SUBSYSTEM REPORTS

Acquisitions/Serials – Dee Nolan

Correct Title Sort on Reports

The serial-44 Claim Report is a report in Aleph that sorts on Title. Previously this report did not ignore articles (The, A, An). This has been fixed and the report now sorts correctly provided the Bib record 245 field has the proper nonfiling character in the second indicator. This was also the case with the priv-09 and the priv-10 custom services reports that were written by the PALS office. These now ignore the beginning articles (The, A, An) provided the Bib record 245 field has the proper nonfiling character in the second indicator.

New ISSN Search in Serial Bar

A new ISSN search was added to the list of indexes in the Serial Bar search. The ISSN only searches your local library records (XXX50). It is labeled ISSN. The original ISSN search has been renamed ISSN BIB and moved to the bottom of the list. The ISSN BIB searches all SYS01 records.

Exported Serial Summary Holdings from Aleph to OCLC's Local Holdings Records

Inver Hills Community College successfully sent their local holdings to OCLC. A file from Aleph was FTP'd to OCLC. IHC sent 276 records. 252 were processed. 24 records were deselected because of errors. Contact PALS if you want to learn more about sending your summary holdings to OCLC.

Routing List Bug

A bug was found in Aleph when a library wanted to delete a faculty patron record that had left their institution and Aleph would not allow them to delete his record. The error they received was “can’t delete because patron is a routing list leader”. The serial-07 report was run on the patron and it showed two linked BIB records to the patron. However, the title and the ISSN columns on the report were blank. It was discovered that the two journals had been deleted, but the routing list still existed and was still linked to the patron record. The library had deleted the subscription record, but not the routing list on the journal. Aleph does not give any kind of an error message that a routing list exists when trying to delete a record.

Incident 16384-138965 was opened with Ex Libris. The incident reports a bug in that a BIB record can be deleted in Aleph even though there is still a routing list attached to it. The incident is requesting that ExLibris displays an error when libraries try to delete a BIB record that has an attached routing list.

If a subscription record has a routing list on it, the routing list needs to be deleted, and then the subscription record can be deleted. If the subscription record is deleted but the routing list is not deleted, a link remains in Aleph between the patron record and the BIB record. Ex Libris is looking into this.

Libraries using Electronic Ordering

- Baker & Taylor – DCT, MSU, MTR, NHC, SCC, BSU
- Midwest – MSU, IHC, GAC, BSU
- Blackwell – GAC
- GOBI with Yankee – CEN, MTR, SCS, SBJ
- Collection Manager with Blackwell – MSU
 - SBJ is currently testing the Collection Manager product with Blackwell, but has not yet put it into production.

Miscellaneous

Changed the z16_copy_to_date in the z16 subscription tables and the z68_subscription_date_to in the z68 order tables from 12/31/2010 or greater to 12/31/2025 as requested by the Acquisitions/Serials User Group for each ADM using Acquisitions or Serials.

Testing the new file-90 vendor record loader process on the development server.

Century College was trained in Acquisitions and began using it in 2009.

New/Updated Knowledge Base Answers (go to the PALS Support Center at <http://pals.custhelp.com/> to view)

- 3285 Acq/Receipt status visible in Web OPAC
- 3302 Automatic creation of item record
- 3326 Items in Web OPAC that say "Expected on"
- 3331 Creating a New Object Code
- 3335 Priv-08 Holding Report
- 3344 Missing budgets from the budget summary report
- 3346 Tutorial for Getting Around the Aleph Desktop

Outstanding Acquisitions/Serials problems reported to Ex Libris

- **SI15384-11106** If a serial record uses ordinal numbering we previously were able to enter a + in the proper subfield of the 853. This no longer seems to be working. Ex Libris has this in development.
- **SI16384-48968** Items and holding have proper type and linking number. The summary holding is skipping one issue and usually it is the first issue of a cycle. This type of thing is happening in several titles and libraries. FIX COMING
- **SI16384-57329** Holding record and items are properly linked with an 853 and subfield \$8 1, but the summary holding is not being created. If the subfield 8 1 is removed from the holding record, then the summary holding displays. FIX COMING
- **SI-16384-61654** Have a journal title that a library receives two copies. There are two subscription records, but only one holding record as they are housed in the same location. The summary holding in the Web OPAC will not display unless both items are arrived. FIX COMING
- **SI16384-62172** A summary statement is being built on items that are not linked properly therefore creating duplicate summary holdings because the library has a textual 866 on those items. In Development since April, 2009
- **SI16384-106854** If an order was sent electronically to a vendor it was not possible to get a printout of a claim letter to send to the vendor even though the EDI for Order Only was checked on the vendor record. This has been fixed with fix #731 in our next service pack.
- **SI16384-107495** When the serial-44 service is run the view history always says Any Claim no matter what the filter had been set to. This has been fixed with fix #744 in our next service pack.
- **SI16384-138965** Routing List bug – see explanation above

Cataloging – Mary Ann Greenwald

- A full re-index, both keyword and browse indexes, of the SYS01 database occurred the latter part of November 2008. A new indexing document was created and is located at this link <http://www.mnpals.org/aleph/idx200811.pdf>
- An annual re-indexing of the SYS01 database is to occur over the November 2009 Thanksgiving Holiday weekend. To see the new indexes that will be created go to the October 1, 2009 MnPALS Indexing Task Force minutes at this link <http://forums.mnpals.org/index.php?board=23.0>
- Two Cataloging Q & A sessions were held on January 28 and January 29. Content for that session is located at this link http://www.mnpals.org/aleph/syslibs/18docs/cat_qa_200901.pdf
- The move to version 19 required testing and writing documentation for Cataloging/Holding/Items/Indexing Informational Sessions.
- The Cataloging Steering Committee filled vacancies for the Private Colleges and Special Libraries. The committee is now comprised of: Bobby Bothmann, Minnesota State University, Mankato (state universities); Lori Pesik, St. Mary's University/Winona (private colleges); Adam Marsnik, Normandale Community College (community colleges); Jane Young, Century College (consolidated colleges); Sarah Quimby, MN Historical Society (special libraries); Robin Horowitz, MN State Law Library (state government libraries). To find their contact information go to this link http://www.mnpals.org/sections/Consortium_UG_Cat_SC.html
- PALS statement on Batch Load of Bib Records. MnPALS libraries will not be able to load their own bib records via the Aleph service bib loaders. Please read the statement located on the PALS homepage <http://www.mnpals.org/aleph/syslibs/cat.html>. PALS will continue to load files of bib records for libraries at a fee. Check the Participating Charges document on the PALS homepage for these fees. "NOTE": This may change in the future as version 19 provided file-90, which is a generic batch loader. Presently, the PALS office is testing this with Minnesota State University, Mankato.
- item-05 shelflist report now works in version 19 after a fix from Ex Libris was installed.
- Cataloger's workday was held on April 23 in conjunction with the Acq/Serials group and on April 24 for just cataloging issues. For a complete list of sessions and documentation go to this link <http://www.mnpals.org/sections/2009acqsercatworkday.html>
- Functionality to automatically create a holding and item record upon the export of a bib record from OCLC's Connexion Client or Browser to Aleph is now available. Eight MnPALS libraries are currently using this feature. If you are interested in implementing this functionality, notify the PALS Support Center. Additionally, there was a session presented by MnPALS librarians on October 27 at the Upper Midwest Ex Libris Users Group conference and on October 28 at the MnPALS User Group.
- Global change of bib (SYS01) and holding (SYS60) records training has occurred for a few MnPALS libraries. They are: Legislative Reference Library, Minnesota Historical Society, St. Cloud State University, and College of St. Scholastica. If you are interested in this Aleph functionality, contact the PALS Support Center. The PALS office continues to offer global change service for a fee to any MnPALS library requiring it. Additionally, there was a session, "Global Changes: Opportunities and Pitfalls", presented at the Upper Midwest Ex Libris

User Group Conference on October 26. The session discussed options on how to perform global changes from three vantage points; e.g. U of M, ODIN/North Dakota, and PALS.

- At no cost, the PALS office will do global changes to all of the 6.5+ million bib records in the SYS01 shared bib database. Notify your Cataloging Steering Committee representative of changes that need to be made across the entire bib catalog. These could be MARC standard changes, such as 440 change to 490 1st indicator 0 with the data in an 830 field. The Cataloging Steering Committee is to notify the PALS office which global changes to do.
- We collaboratively wrote a step-by-step document with Minitex on how to send your serial holding records to OCLC's local holding record update service (LHRUS). Testing with Inver Hills Community College was completed so that a file of their holdings has been updated at OCLC. For a copy of the document go to this link <http://www.mnpals.org/aleph/syslibs/acqser.html>. A session on this topic was presented on October 27th at the Upper Midwest Regional Ex Libris User Group meeting.
- Over the summer, we met with a U of M librarian to learn the fine points of setting up the tables for the authority functionality available in Aleph since version 18. Mike Barnett was contracted to work on the technical aspects of setting this up. Authorities UPD=Y functionality was turned on by the PALS office the first part of September. There have been some issues that have not yet been resolved. The MnPALS Authority Task Force has been working with the PALS office to determine the next steps that should be taken to clean up the issues.
 - To read about the meeting with the Authority Task Force go to their Forum <http://forums.mnpals.org/index.php?topic=1071.0>
 - To read about the Form Subdivision issue go to this Forum topic <http://forums.mnpals.org/index.php?topic=1079.0>
 - To read about the Author Field adds 2nd indicator go to this Forum topic <http://forums.mnpals.org/index.php?topic=1057.0>
 - To read about the Punctuation Stripping issue go to this Forum topic <http://forums.mnpals.org/index.php?topic=1059.0>
 - At the MnPALS User Group Meeting on October 28, the Authority Task Force will give an update on the issues.
- Approximately 10,000 NetLibrary records loaded in 2004 for MSU, WSU, SCC, UCR, SCS and SBJ did not have the OCLC number moved from the 001 field to the 035 field. These records have been fixed. The importance of this is that when a bib record is saved to the server the Aleph System ID number is placed into the 001 field. If a fix were not in place to move the OCLC # to the 035 field, the OCLC number would be lost.
- When deleting bib records, you may see a Doc Validation error box appear saying "Record updated by user BATCH-UPD on yyyy/mm/dd, time of day". This is just an informational message. BATCH-UPD is the cataloger name assigned to the authority flip functionality. You can override the message to delete your record.
- Loading monthly and weekly Marcive records for the libraries that subscribe to the service: Gustavus Adolphus College (GAC), Bemidji State University (BSU), and St. John's University/College of St. Benedict (SBJ).

- Created custom program to update nearly 101,000 bib records by adding a 035 field with the OCLC number for St. John's University (SBJ) in June 2009.
- Loaded special sets of bib records for libraries as requested.
- Loading NetLibrary records for libraries that subscribe to the records.
- Added two additional match points for the OCLC, Marcive, and file-90 vendor bib record loaders: 935 field (vendor id) and 035 field (oclc number) on the development server and are currently testing it.
- Libraries were notified of (2) version 19 service packs that had been tested on the development server and moved to production. A third version 19 service pack is now being tested on the development server with plans of moving it to production early in November 2009. To read about the service packs go to this link http://tables.dev19.mnpals.net/u19_1/service_packs/

New/Updated Knowledge Base Answers (go to the PALS Support Center at <http://pals.custhelp.com/> to view)

- 3285 Acq/Receipt status visible in Web OPAC
- 3286 Adding material type to table
- 3287 Format in the WebOPAC
- 3289 Item general retrieval file located in alephe/scratch
- 3290 WCL (collection) search gives results that do not match
- 3294 856 URL link display in GUI or WebOPAC
- 3296 tab_type_config location
- 3298 Total delete functionality in Cataloging version 19
- 3301 Call number label printing
- 3304 Analytic linkages for serials
- 3305 WFF: Fixed field indexes and how to use them
- 3308 Authority headings maintenance
- 3315 Generate a list of books to weed
- 3317 Fixed field indexing for collection analysis
- 3285 Acq/Receipt status visible in Web OPAC
- 3302 Automatic creation of item record
- 3321 Why is <video> showing up as a <print book>
- 3325 Suppressing Holding records
- 3326 Items in Web OPAC that say "Expected on"
- 3330 Automatic creation of Holding and Item records
- 3331 Creating a New Object Code
- 3333 Global change authorization
- 3335 Priv-08 Holding Report
- 3343 Creating automatic holds on on-the-fly/circ-brief item records
- 3344 Missing budgets from the budget summary report
- 3345 Add large records so they appear in the OPAC and are indexed
- 3346 Tutorial for getting around the Aleph Desktop
- 3347 Using \$\$ as characters in bib record vs. delimiter
- 3348 p-manage-21 (global change) - delete field
- 3349 Shelf reading report (item-04) Inventory missing

Circulation – Susan Dueis

Changes

- At the Fall 2008 Circulation User Group, it was requested that the special Circ status of “Lost” be changed to something more accurate and informative for the patron. Items now being declared “lost” (billed for replacement) show the status of “Overdue/Billed” in the due date field in the web OPAC and the GUI. We also changed the label for “Lost” in the dropdown choices for “Loan Status” in the setup for Circ-04 Loan Report. It says “Overdue/Billed” as well. This choice will pull loans that have this special Circ status of “Overdue/Billed” (formerly known as “Lost”).
- At the end of September 2009, we ran the annual process to delete patron records in Aleph that had been expired prior to July 1, 2008, if they had no activity on their record (loans, cash, ILL’s, etc.). This year, there were nearly a quarter million records that were marked to possibly delete (if no activity).
- In responding to requests from Crown College and St. Ben’s/St. John’s, we added ID types in Aleph just for CWN and SBJ. They wanted a means to allow their patrons to use the registration/tech ID without having to know that the ADM 3-letter symbol needed to be prefixed. These new ID types are visible to all libraries in the Consortium in the patron record in Aleph in the [T] Additional IDs window, in the Key Type dropdown window. They are type 35 – CWN Registration id and 55 – SBJ Registration id. These ID types should be ignored by all libraries other than CWN and SBJ. This functionality won’t work for MnSCU libraries as the registration/tech ID is not always unique across MnSCU campuses.
- The functionality to automatically remove an item process status when the item is circulated by its barcode has been setup and tested. There is a tab100 parameter that must be set by the PALS office for each library to define which item process statuses should be removed when an item is loaned, returned, requested, renewed, etc. To request this functionality setup, contact the PALS Support Center at <http://pals.custhelp.com/>
- Minnesota State University, Mankato is working with the PALS office to set up patron-initiated booking, for limited use in booking study rooms.

Problems

- We continue to have problems with execution errors (aborts) when some batch services are run in Aleph. We are working on a potential fix recommended by Ex Libris. This is not limited to Circulation services, but we do know that it is happening occasionally with cir-10 Courtesy Notices, cir-50 and -51 Overdue Notices and cir-13 Recall Items on Loan. When this happens, Aleph usually does not produce output reports (notices, etc.). It may also cause some things to process correctly and others not to. For example, one item may go to “Lost” when running your overdues and be billed correctly, but another item in the same run will go to “Lost”, but will NOT be billed correctly.
 - You can see when the service has errors by viewing the batch log in the Task Manager. In the upper pane, the Status column will usually say “Done with errors” when these types of errors occur.

- Displaying blocks in web OPAC for libraries other than patron's home library. This was working in version 18 for a while, but is not working now. We continue to seek resolution on this from Ex Libris.

Fixes

- With the move to Aleph version 19, a problem of incorrect charges being charged for replacement costs/notice/processing fees arose. The problem was found to be a setup issue in tab 34 Lost Materials Cost. It turns out that column 5 (call number) must only have a single #, if # are used, but columns 6 (collection) and 7 (item material type) must have five # in each column, if # are used. In version 18, the setup wasn't as critical, but in version 19, it is critical. We changed the tab 34 setup for those libraries that were affected.
- In May 2009, ISRS informed us that they did, indeed, have a problem with the conversion to Oracle for ISRS (student record) data that impacted records sent to Aleph. ISRS said the "primary select for selecting which student records to send to Aleph was wrong". They corrected that problem, but needed to send a full refresh of student records for MnSCU libraries because some records had been missed that should have been sent to load into Aleph.

Course Reserves

- Over 25 libraries are currently registered as using the course reserves module.

- The course-04 service disappeared in the change from version 18 to version 19. We have since discovered a CCL report to retrieve the same data; see Answer #3312.

- A course reserves interface was integrated into MnPALS Plus this summer. Check it out at <http://plusdemo.mnpals.net/vufind/Course/Advanced/TRC>

New/Updated Knowledge Base Answers (go to the PALS Support Center at <http://pals.custhelp.com/> to view)

- 3107 Circulation Statistics by Patron (edited)
- 3187 Statistics in the Item Record (edited)
- 3291 Getting List of Loans for a Patron
- 3295 Accessing Web Links to Aleph Tables, Services and OPACS
- 3309 Faculty Note on File of Records Sent from WebOPAC
- 3310 Course Notes in the OPAC
- 3311 OPAC Display of Course Reading Bib Record Notes
- 3312 Course Reserve Service Course-04
- 3314 Course Reserve Statistics
- 3323 Limiting by Library When Adding Course Reserve Bibs
- 3324 Course Reserve Bibliographic Records and Connection Records
- 3332 PLIF Loader File Structure and Processing
- 3338 Aleph Course Reserves Functional Training Documentation
- 3343 Creating Automatic Holds on On-the-fly/Circ-brief Item Records

Interlibrary Loan – Sonja Eilertson

Interlibrary Loan Relationships

- MnPALS Aleph and MnLINK VDX libraries are exchanging interlibrary loan requests. St Cloud State University, Center for Minnesota Libraries Exchange, St John's University and College of Saint Benedict are exchanging requests with Great River Regional Library.
- Bethany Lutheran College, South Central North Mankato, and Minnesota State University, Mankato are exchanging requests with Traverse des Sioux and Martin Luther College.
- Concordia College is exchanging requests with Lake Agassiz Regional. Minnesota State University Moorhead will begin exchanging requests with Lake Agassiz Regional in the future.
- The above libraries have local delivery arrangements. If you have a local delivery arrangement with a library that uses the VDX software, typically your local public library, and you are both interested in exchanging ILL requests let me know and we can look into setting your library up to exchange ILL requests with the VDX library.
- Minnesota State University Moorhead and Concordia College are exchanging ILL requests with Fargo Public Library. Fargo Public Library is a member of ODIN and uses ALEPH ILL to process requests. Remember to exchange requests with an ODIN library your ILL unit must be configured on the ODIN server.
- Rasmussen College will be leaving the consortium. The Rasmussen ILL units have been closed for borrowing and lending.

Service Pack Fixes Installed

- Interlibrary loan requests on a patron's "Your Borrowing Record" are now sorted by last activity date descending.
- When using the "Multi-field Search" the search terms are retained.
- The Admin tab in interlibrary loan can now be set to a default setting. This example with J shows as a default view Task Manager Print files. This line would need to be added to your ill.ini. This could help to get to your lending slips in fewer clicks.

ELUNA Enhancements

- A number of ILL enhancements were submitted to Ex Libris for consideration for a future version of Aleph. The enhancement to get the highest number of votes from the ELUNA membership was to improve interoperability between Aleph and OCLC ILL by support of OCLC direct request.
- Other ILL enhancements submitted were: display additional patron information in the ILL request, control the number of renewal requests in the OPAC, include separate logical bases for borrowing and lending locate, allow printing of multiple requests within the module.

Blank Request Form

- At the fall 2008 ILL User Group meeting, the user group members requested that the ILL blank request form be changed. The group requested that the asterisks be removed from mandatory fields and the phrase “Missing or incorrect information may delay filling your request” be added to the form.
- The term “source” field be removed and other terminology such as “where found” or source of your citation should be used.
- The following text was added to the blank journal and book request form:
 - "Fill in as much information as possible. Missing or incorrect information may delay filling your request.
 - Mandatory fields are marked with an asterisk (*)
 - Only filling in Mandatory fields will not be enough information to process the request, so complete as much information as you provide to expedite fulfilling your request."
- The asterisk marking mandatory fields were left on the form because these fields are required to be completed for the request to be entered.
- The above text was also added to the journal request form when an article request is entered using a bib record. For example, your patron searched for the Journal of Nursing and created an ILL request.
- The "Source" field on the blank journal request form was changed to "Where was information on this article found?"
- The "Source" field on the blank book request form was changed to "Where was information on this book found?"

Patrons and ILL Requests

- We have a few Support Incidents with Ex Libris about patrons and interlibrary loan: patron with no loan activity can't cancel an ILL request, a patron with an expired patron record is allowed to enter ILL requests and a patron without loans at a library that allows them to select the ILL unit to handle their ILL request is not giving the choice of ILL unit.
- Ex Libris did place a fix on our non-production server that resolved all of these issues. We have not been told when this fix will be available for us to install on our production server.

Lending Slips

- The latest service pack brings back the patron name on the lending slips. This service pack is scheduled to be installed in November.
- A lending slip printed by Minitex (IMII), University of Minnesota, Twin Cities (IMNU), University of Minnesota, Crookston (IMCR) or University of Minnesota, Morris (IMNX) will not have the patron name printed on the slip. The patron name is not printed on the lending slip because of a patron privacy policy at the University of Minnesota.

- At the fall 2008 ILL User Group meeting, the group passed a motion to add patron's email address to the lending slip. A field has been added to the lending slips for the patron email address. At this time we are not able to populate the patron email address into the field.

ILL Work Plan Items Moved to the Strategic Plan

- The work plan items moved were the testing, implementing and training for interoperability between Aleph ILL and OCLC ILL. We are waiting for the Aleph enhancement to support OCLC direct request.
- Also the work plan item to maintain searching and interoperability with the MnLINK Gateway libraries was moved to the strategic plan. This item relates to the possible future move of the MnLINK Gateway to a new search software. We want to maintain the ability for our patrons to search the Gateway and have their ILL request transferred into Aleph ILL. Also the interlibrary interoperability between Aleph and the Gateway ILL software should be maintained.

OPAC – Perry Madden

Updated Item Process Statuses

- Gustavus asked that three unique item process statuses be set to Available. They are:
 - FI for Fiction Display
 - DV for Diversity Display
 - GI for Global Display

The 3 Item Process Statuses listed above were not being used by any other libraries. Our policy, as outlined on our website, http://www.mnpals.org/sections/item_process_status.html is that since no other libraries are using these Item Process Status codes at this time, we made them Available.

If libraries would like to use any of the Item Process Statuses already defined as Available, you do not need to notify the PALS staff. You should be able to change your items to that Item Process Status, and they will then show in the Web OPAC as Available.

Aleph Changes

- The linked 880 fields for alternate characters have been implemented on the production Aleph Server. The information added is foreign language (character set) author, title, etc.
- Holdings information displayed has been expanded. This includes Access Restrictions , Reproduction Notes, Technical Details, Conditions for Use , Supplement, Index Notes, etc.

Systems – Dan Honetschlager

- Re-indexed the version 18 production database on the development server during 2008 Thanksgiving week and implemented in production on November 30, 2008.
- Upgraded ORACLE on dev18 and prod18 before final version 19 upgrade and switch to production.
- Upgraded to version 19 on production on March 21, 2009.
- Re-indexed short docs on production in August 2009, so that titles in custom reports and canned reports from Ex Libris sorts correctly now.
- Moved wiki, forum, PALS homepage, mailing lists, PALSconnect, and EZproxy production applications to the MSU IT VMware servers.
- Added new direct index access point for the 935 vendor ID field, re-indexed the direct indexes on the development server, and currently testing it.
- Will be installing the latest version 19 service pack on production during November 2009 before Thanksgiving break.
- Will be re-indexing the production database on the development server during 2009 Thanksgiving week and implementing in production on Sunday, November 29, 2009.

Recorded Sessions

- A revised Getting Around the Aleph Desktop Presentation can be found at <http://www.mnpals.org/sections/recordedsessions.html>
- For the move to Aleph version 19, web sessions were held for each module to provide an overview of new functionality. The version 19 recorded sessions can be found at <http://www.mnpals.org/sections/recordedsessions.html>
- FYI for the move to Version 19: we offered 29 web sessions and had 462 enrolled attendees.

Not Aleph

EZproxy

- Between August 2008 and August 2009, we completed EZproxy conversions for 27 institutions and set up 10 new EZproxy sites. Seven sites have implemented LDAP authentication within EZproxy.
- Set up test instance of EZproxy.
- Updated all instances of EZproxy to the latest version and moved them to the MSU VMware cluster.
- For more information on this product, check out the MnPALS Forum:
<http://forums.mnpals.org/index.php?board=47.0>

OCLC Link Manager

- We have 9 libraries that have contracted to use OCLC Link Manager as their Open URL Link Resolver.
- For more information on this product, check out the MnPALS Forum:
<http://forums.mnpals.org/index.php?board=68.0>

MnPALS Plus

- Changed script to update database four times per day. On Aleph the collection of updates (both in bib records and availability status) now runs at 3 AM, 11 AM, 2 PM, and 5 PM. On MnPALS Plus the updates run at the 1/2 hour. So once the extract gets done on Aleph and pushed to MnPALS Plus, the updates will be added on the next 1/2 hour. Most of the time the extract will take less than 30 minutes, so the update will happen fairly quickly. We have been running this way since April 2009. Prior to that, updates were only made once per day.
- Released a new version of MnPALS Plus in August 2009. A document outlining the updates can be found at http://www.mnpals.org/pals/plus_updates200908.pdf
- For more information on this product, check out the MnPALS Forum:
<http://forums.mnpals.org/index.php?board=35.0>
- In MnPALS Plus, we can configure whether Hold, ILL or both links display. The default is to show the hold link if patron and item are from the same institution, and show the ILL link if the patron is from a different library. We can also:
 - 1 - show both the ILL and the Hold link
 - 2 - show only the ILL link but never the Hold link
 - 3 - Don't show either the hold or ILL linksLet the PALS office know which of these choices you would prefer.
- Distributed MnPALS Plus to ODIN. They are working to implement a version of it for their libraries.

PALSconnect Linker

- PALSconnect Linker is an OpenURL Linker (based on the CUFTS/GODOT open source product from Simon Fraser University).
- Set up development and production servers for PALSconnect Linker.
- Set up database backups for PALSconnect Linker servers.
- Implemented on production for two beta libraries: Minnesota School of Business (MSB) and Crown College (CWN).
- Completed configuration and testing of the ILL link between Aleph and PALSconnect Linker.

PALSconnect ERM

- Selected three beta libraries to test the open source ERM product. They are St. Cloud State University, Minnesota State Community and Technical College - Moorhead, and Bemidji State University.
- Completed initial conference call with beta libraries.
- Set ERM initial beta library training date to November 12, 2009.

Evergreen

- Selected Evergreen as the open source ILS to work with.
- Established an open source Evergreen implementation team.
- Set up three servers for the Evergreen product: egdev.mnpals.net, egdemo.mnpals.net, and egplay.mnpals.net.

Conferences

- Attended 2008 MLA conference and had a professional table to showcase PALS services and open source solutions.
- Attended 2008 North Dakota Library Association (NDLA) conference and had vendor booth and gave presentation on the Discovery Tool.
- Attended Ontario Library Association Super conference in January 2009.
- Attended Koha Conference 2009 in Plano, Texas in April.
- Attended Evergreen International Conference 2009 in Georgia in May.
- Attended and co-presented MnPALS Plus at the July 2009 WilsWorld conference in Madison, Wisconsin.

- Attended October 2009 South Dakota Library Association (SDLA) conference and had a vendor booth to showcase our open source solutions.
- Attended October 2009 Minnesota Library Association (MLA) conference and had vendor booth and gave presentation on Budget Friendly Open Source Solutions.
- Attended October 2009 Iowa Library Association (ILA) conference and had a vendor booth to showcase our open source solutions.
- Attended and presented at the October 2009 Midwest Regional Ex Libris User Group conference in St. Paul.

Task Forces

Authorities

- For more information on this task force, check out the MnPALS Forum:
[<http://forums.mnpals.org/index.php?board=22.0> <http://forums.mnpals.org/index.php?board=22.0>]

Indexing

- For more information on this task force, check out the MnPALS Forum:
[<http://forums.mnpals.org/index.php?board=23.0> <http://forums.mnpals.org/index.php?board=23.0>]
- Check out the Agenda and Minutes of the most recent meeting which was held on October 1, 2009.

MnPALS Plus Working Group

- Pete McDonnell reports on behalf of the group: <http://www.mnpals.org/sections/plusgroup2009fall.html>
- For more information on this task force, check out the MnPALS Forum:
[<http://forums.mnpals.org/index.php?board=78.0> <http://forums.mnpals.org/index.php?board=78.0>]

Reports Task Force

- Randi Madisen reports on behalf of the group: http://www.mnpals.org/sections/reports_fall2009.html
- For more information on this task force, check out the MnPALS Forum:
[<http://forums.mnpals.org/index.php?board=31.0> <http://forums.mnpals.org/index.php?board=31.0>]

Office Teams

Communications Team

Register for the MnPALS Forums and MnPALS Wiki

- Register to use the MnPALS Forum and Wiki via the MnPALS Forum at: <http://forums.mnpals.org>. This same user name and password will allow access to both the Forum and the Wiki. You will receive confirmation of your User Name and Password once you register.
- We ask that you please use the following protocol for your username: FirstnameLastname (e.g. RodBruce). Do not include an underscore or other special characters in your username.
- Once you are registered, you will have to sign on to the Forum and Wiki separately; however, the same username and password will work for both.

Archives of the old PALS Mailing Lists

- Archives of the old PALS Mailing lists are available to anyone logged into the PALS Forum. Access to the archives is through a posting found in the PALS Forum under Consortium of MnPALS Libraries; Functional Areas / Modules.

Marketing Team

- A tagline for PALS Innovative products has been developed. It is "Innovative Solutions for Information Access".
- The overall name for these open source products is "PALsconnect". Individual product names are PALsconnect ERM and PALsconnect Linker. An all encompassing name needs to be created for MnPALS Plus and the Evergreen OS/ILS. Along with the names, snappy blurbs or taglines are being created for the innovative products. This is being done for product identification as we attend library conferences and to improve the Products section of the PALS homepage.
- To demo the products and discuss our open source solutions, a PALS vendor exhibit booth was present at these Fall Conferences: South Dakota Library Association (SDLA) in Aberdeen from October 7-9; Minnesota Library Association (MLA) in St. Cloud from October 14-16, Iowa Library Association (ILA) in Des Moines from October 21-23. Additionally, we shared our innovative open source solutions at the Upper Midwest Ex Libris Regional Conference in St. Paul from October 26-27, and at the MnPALS User Group on October 28.
- Brochures have been developed for PALS, MnPALS Plus and EZproxy.
- Along with a vendor exhibit at MLA, a 1 hour-15 minute presentation entitled "PALS Innovations: Budget-Friendly Open Source Solutions" was given.
- We continue to identify prospective customers for the innovative products, along with stating that we offer Software as a Service (SaaS) for EZproxy and Aleph. The goal is to increase our customer base.

MnLINK Gateway Update

- The MnLINK Gateway has a new look. You can access the MnLINK Gateway at the same url <https://www.mnlinkgateway.org>

PALS Strategic Plan and Work Plan

Work Plan Being Discontinued

- The PALS staff has been working over the last several months to develop a new Strategic Plan. The Strategic Plan is being used to direct the work and priorities of the staff. Because of this, it has been decided to discontinue the Work Plan, which was previously used to track work and priorities.
- The PALS staff completed a review of the Work Plan to determine what action needed to be taken on the tasks that remained there. Each task fit into one of the following categories:
 - Completed – see below for a list
 - Removed task suggested by PALS staff – thought at one time to be things we should do, but no longer seem relevant or important
 - Removed task suggested by Consortium libraries – tasks recommended by libraries to be added to the Work Plan which no longer seem relevant or important – see below for a list
 - Task to move to the Strategic Plan – see below for a list
 - Task to track by some other means – these are either regularly scheduled tasks or tasks for which there is a RightNow ticket to track it

Strategic Plan Tasks Completed as of October 2009

The list below only includes specific tasks that have been completed. It does not mean that the entire strategy or goal has been completed.

Goal 1: Become financially sustainable

1.1. Strategy: Increase customer base

1.1.2.1. Present MnPALS Plus proposal to ODIN

1.1.2.2. Present MnPALS Plus proposal to SDLN

1.1.5. Use the presentation at the European Library Automation Group conference to market MnPALS Plus

1.2. Strategy: Increase financial support from MnSCU

1.2.1. Present case to MnSCU CAOs at meeting

1.2.2. Present case to MnSCU Leadership Finance Committee

1.2.3. Create a case document "PALS Progress and Outlook since the 2005 Study"

1.2.4. Encourage Library Deans, Directors and Coordinators to present our case to their leadership

1.2.8.1. Obtain Base Budget increase for FY2010

1.3. *Strategy: Increase revenue from existing customers*

1.3.3.1. Increase User fees in 2010 (\$ increase to base Year on Year)

1.4. *Strategy: Control expenses*

1.4.6. Negotiate a financially acceptable maintenance agreement with ExLibris

Goal 2: Diversify product offerings

2.1. *Strategy: Explore ways to provide access to additional data resources using MnPALS Plus (Other ILSs, non-MARC data)*

2.1.1.1. Investigating MN Digital Library records

Goal 3: Provide customers with services that meet their needs and exceed their expectations

3.1. *Strategy: Identify and describe our potential customers and their needs AND Strategy: Identify services to meet those needs*

3.1.2.1. Establish pricing structure for MnPALS Plus

3.1.2.2. Establish pricing structure for OS OpenURL (CUFTS/GODOT)

3.1.2.5. Establish pricing structure for EZProxy

Goal 4: Provide a suite of core library management products to meet the future needs of libraries

4.2. *Strategy: Implement an Open Source ILS for new customers*

4.2.1. Hire additional tech staff and user support staff.

4.2.2.1. Subscribe to Koha mailing lists and monitor web sites

4.2.2.2. Subscribe to Evergreen mailing lists and monitor web sites

4.2.2.3. Four members attended Koha conference in Plano, TX on April 16 and 17

4.2.2.4. Four members attended Evergreen Conference in Athens, GA on May 20-22, 2009

4.2.2.5. Set up conference calls with libraries that are currently using Koha and/or Evergreen

4.2.3. Get quotes from both Equinox and LibLime for data conversion and setup of beta library.

4.2.3.1. Contact Equinox asking for a price quote

4.2.3.2. Contact Liblime asking for a price quote

4.2.4. Select an open source product to test with a real library. Make sure it adheres to standards and is compatible with ILL systems

4.2.4.1. Determine what criteria should be used to make our decision on a product

4.2.4.2. Evaluate each functional area in Evergreen and Koha

4.2.12. Set up demo Evergreen system

4.4. *Strategy: Increase availability and functionality of MnPALS Plus, the discovery tool*

4.4.7. Implement at least one foreign language interface

4.4.8. Add an Aleph Course Reserve interface to MnPALS Plus

4.4.11.1. Identify tools used by the community

4.4.11.2. Assign staff to become familiar with tools that we have not worked with before

4.4.12.1. Round #1 Functionality to be added to MnPALS Plus by August 2009

4.5. Strategy: Implement an open source Open URL Link Resolver

- 4.5.1. Investigate CUFTS/GODOT product
- 4.5.2. Install CUFTS/GODOT product
- 4.5.7.1. Identify Beta test libraries
- 4.5.7.4. Assist Beta libraries in setting up locally subscribed databases
- 4.5.7.5. Test to make sure it works with proxy servers
- 4.5.14. Work with Management to assign staff for ongoing operations and support
- 4.5.16. Add link to Aleph ILL for CUFTS/GODOT

4.7. Strategy: Implement an Electronic Resources Management System (ERM) - Use CUFTS/GODOT product

- 4.7.2. Assign staff to investigate
- 4.7.7.1. Recruit three beta libraries
- 4.7.9.1. Identify tools used by the community
- 4.7.9.2. Assign staff to become familiar with tools that we have not worked with before

Goal 5: Collaboration - with customers, vendors, campuses

5.1. Strategy: If we decide to run an Open Source ILS, commit significant resources to the development and support of the project

- 5.1.1. Identify Open Source ILS projects of interest
- 5.1.2. Be active in communities built around projects that we may eventually join

Work Plan Tasks Completed

Task Number	Task Name	Priority	Notes
1	Negotiate maintenance agreement with Ex Libris	1C	
2	Develop and test process where library staff can make global changes to bib records.	2A	
3	Set up and test functionality where the item process status is automatically removed when item is circulated by barcode.	2A	
4	Extract serials summary holdings for import by OCLC	2A	
5	Develop communications plan	2A	Communications Guidelines document produced.
6	Test ISO ILL between ALEPH and VDX	2A	
7	Electronic link	2A	Preceding/succeeding entry links are not direct. When a succeeding title is entered in the 785 with the corporate body in subfield a and "Annual report" in subfield t, clicking on the link does not take you to the record for the succeeding title. When a succeeding title is the name of a corporate body with a bracketed subtitle supplied by the cataloger, the bracketed subtitle is not included in the 785 field. Ref User Group recommends MARC 76x-78x fields not be linked as they are not access points.
8	Extract holdings from Aleph for OCLC's LinkManager	2A	
9	Implement EZProxy	2A	
10	Test functionality of tab_loader to add holdings and items when loading records	2A	
11	Hold webinars on preparing ALS reports	2A	Webinar and follow-up in January, 2009
12	Create document describing which Aleph reports to run for ALS reports	2A	
13	Investigate LDAP authentication with MnPALS Plus	2B	Investigation complete; it is possible.

Task Number	Task Name	Priority	Notes
14	Add 880 tags to OPAC main record display for foreign language titles	2B	Requested by Reference User Group, October, 2008.
15	Display 866 867 and 868, 538, 506, 843, and 845 on Holdings page	2B	Requested by Reference User Group, October, 2008.
16	Open Google books link in a new page in the OPAC	2B	Requested by Reference User Group, October, 2008.
17	Investigate LDAP authentication with the Aleph Web OPAC	2B	LDAP server needs to have Aleph identifying information (reg id/tech id?). Requested by Systems User Group, spring 2008. Investigation complete; it is possible.
18	Do test Aleph version 19 upgrade	2B	November, 2008
19	Upgrade to Aleph version 19	2B	March, 2009
20	Implement new v.18 authorities functionality and reindex database	2C	
21	Version 18: Test authority file processing	2C	
22	Remove TYP <Print Book> from Course Reserves display	2C	Requested by Course Reserves libraries, October, 2008
23	Purchase and load new authority file	2C	
24	Evaluate functionality of version 19 on the test server.	2C	
25	Prepare booking and media maintenance training for libraries	3A	
26	Conduct booking training for libraries	3A	Session held summer, 2008.
27	Change end date in subscription records from 12/31/2010 to 12/31/2025.	3B	Requested by ACQ/SER User Group, spring 2008
28	Remove availability status from union view of the OPAC	3C	
29	Resolve MARCIVE loader table issue	3C	Work-around implemented.

Task Number	Task Name	Priority	Notes
30	Set up macro to automatically process loading of records one at a time.	3C	October, 2008 Tech Staff meeting
31	Investigate and configure new Z39.50 targets	4A	Being added as requested. Consider operations from this point forward.
32	Write documentation and do training for Aleph ILL and VDX ILL interaction	4C	
33	Check if new patron can have their initial password set to their last name.	6A	Requested by CIRC User Group, Fall, 2007. Completed for PLIF.

Tasks Removed

Task Number	Task Name	Functional Area	Priority	Notes
52	Test interface with Title Source (B&T collection manager)	ACQ/SER	2B	Requested by ACQ/SER User Group, October, 2008. Vendor wants academic libraries to use GOBI. Title Source is for public libraries.
93	Test label printing in Aleph	CAT	4A	
110	Help on Field Tag Information added for OCLC fields	CAT	5C	

Work Plan Tasks Moved to the Strategic Plan

Task Number	Task Name	Functional Area	Priority	Notes
1	Investigate Open URL Link Resolver	Discovery	2A	
2	Investigate Open Source ILS	ACQ/SER, CAT, CIRC, ILL, OPAC, SYSTEMS	2B	
3	Offer forums to library groups outside the consortium	Customer Relations	2B	
4	Investigate moving server support to MnSCU	Operations/Support	2B	
5	Investigate Federated Search	Discovery	2C	
6	Test EDI with EBSCO for serials claims	ACQ/SER, SYSTEMS	2D	
7	Investigate discovery tool components	Discovery	2D	
8	Implement EDI book invoices	ACQ	3A	Requested by SER/ACQ User Group, October, 2008
9	Test ISO ILL between Aleph and OCLC	ILL	3A	We have done an initial round of testing with OCLC and have reported specific problems to ExLibris; discussions with Ex Libris are ongoing. We are waiting for Direct Request functionality.

Task Number	Task Name	Functional Area	Priority	Notes
10	Implement ISO ILL between Aleph and OCLC	ILL	3A	We are waiting for Direct Request functionality.
11	Investigate how MnSCU's STARS project (single sign-on) will affect authentication for patrons	OPAC	3A	Todd Digby is on the MnSCU committee working on STARS.
12	Test/Implement EDI book claiming	ACQ	3B	
13	Upgrade to new Aleph versions	Upgrade	3A	
14	Implement Binding	SER	3C	
15	Write documentation and do training for Aleph ILL and OCLC ILL interaction	ILL	4C	
16	Saving search/Search Persistence	OPAC	4D	
17	Color Scheme	OPAC	4D	
18	Work on Web OPAC help screens--need input from libraries	OPAC	5A	
19	Test functionality such as authentication, ILL, and Z39.50 connections between Aleph and OCLC's Navigator	Gateway interface	5B	Navigator will replace ZPortal as the MnLINK Gateway search interface, expected in 2010 or 2011.