PALS Report

for the

Consortium of MnPALS Libraries
User Group Meeting

October 23, 2014
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**Aleph Subsystem Reports**

**Acquisitions/Serials – Dee Nolan**

**Acquisitions/Serials Workday**
Approximately 20 people attended the Acquisitions/Serials Workday on April 24 at 7700 France Avenue South in Edina. Evaluation comments were positive including a remark "best acq/serial workday ever".
[https://www.mnpals.org/content/acquisitionsserials-workday-april-24-2014](https://www.mnpals.org/content/acquisitionsserials-workday-april-24-2014)

**EDI with Ingram Library Services**
EDI Ordering is now available with Ingram Library Services. North Hennepin Community College is currently using the EDI ordering with Ingram. If other libraries are interested, contact the PALS office and we will help you with the setup. Ingram is also able to do EDI invoicing and EDI order acknowledgements with Aleph.

**Priv-21 Titles/Items with Circ Events by Call Number/Date Range**
The item price has been added to the output of the Items report.

**Trainings**
Bethany Lutheran College added the Acquisitions Module. A two day training for Bethany was held in July, 2014.

**Libraries using Electronic Ordering**
Baker & Taylor – DCT, MSU, MTR, NHC, SCC, BSU, SCS
Title Source 3 with Baker & Taylor – UCR
Book House – GAC
Ingram – NHC
Midwest – MSU, IHC, BSU
InterACQ with Midwest – GAC
Yankee – GAC
GOBI with Yankee – CEN, MTR, SCS, SBJ, MSU, MCT

**Libraries using Electronic Invoicing – Monographs**
Yankee – MTR
Baker & Taylor – UCR

**Libraries using Electronic Invoicing – Serials**
EBSCO – BSU, CSS, GAC, HRL, IHC, MCT, MSU, MTR, NDC, SBJ, SCS, SSU, TRC, TRM, UCR, WSU
**Booking – Sonja Eilertson**

**Study Room Web Interface**
The “PICK A DATE” calendar font was increased. The time display was added to the right of the display. The study room description was added to the bottom of the display.

![Study Room Web Interface Diagram]

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**Cataloging – Alex Kent**

**Steering Committee Update**
At the Fall 2013 User Group Meeting, the Cataloging Steering Committee presented a panel titled RDA Day One: Seven Months Later, in which panelists described their library’s implementation strategies and experiences.

**Cataloging Virtual Workday Sessions**
In lieu of a spring Cataloging Workday, the Cataloging Steering Committee decided to hold virtual workday sessions. They facilitated three conference call presentations:
- April 21 – Collecting IPEDS Statistics, facilitated by Adam Marsnik and Randi Madisen
- May 7 – Islandora and Institutional Repositories, facilitated by Alex Kent and Linda Richter
- October 7 – Strategies for Cleaning up Data in Your System, facilitated by Bobby Bothmann and Alex Kent

**NCES Academic Libraries Survey**
On April 21, from 1-2 pm, Adam Marsnik (Normandale Community College) and Randi Madisen (Century College) hosted a conference call on the NCES Academic Libraries Survey (ALS) (previously IPEDS). The survey allows you to compare your library’s statistics with other academic libraries in the U.S. The survey is conducted every two years, but it is important to collect data for it every year. The statistics generated for the IPEDS ALS survey are
also useful for accreditation purposes. It is recommended that you get your statistics as close to June 30 as possible. It is also a good idea to write down how you come up with your statistics and be consistent every year.

There are reports in Aleph that can help you generate statistics related to expenditures, your collections, and library services such as total interlibrary loans requested. For the ALS survey, a lot depends on how you use Aleph and have things set up. For example, if you use Aleph Acquisitions you can set up object codes to help generate more specific statistics. Reports in Aleph Acquisitions that can be useful for expenditure reports are Acquisitions 16 (Budget Summary), Acquisitions 17 (serial-17), Summary of Expenditures by Budget and Object Code (priv-18), and Titles per Budget Number Spent/Circ Analysis by Budget (priv-11). These are all found in Acquisitions/Serials.

To collect services-related information (i.e., circulation transactions, total interlibrary loans, reserve circulation transactions) use Borrowing Library Statistic Report (ill-63), Lending Library Statistics Report (ill-64), and General Circulation Statistics (cir-30). These are all found in Aleph ILL and Circulation.

For collection related information, use Item Reports (priv-12), Titles/Items with Circ Events by Call Number/Date Range (priv-21), and Titles in a Collection (priv-20). These are all found in Aleph Cataloging or Circulation. Use Subscription Reports (priv-10) found in Aleph Serials.

When you are running reports in Aleph and looking at the data and sorting it, we recommend exporting the data to Excel and sorting various columns there. If there is a column you don't need you can delete it from the spreadsheet.

Important points to remember about the ALS/IPEDS survey:
• Collect statistics for it every year
• It is conducted every two years (next in 2015)
• Write down how you collect data so someone new could do it
• Allows you to compare your library’s statistics with another libraries
• Allows you to compare your library’s statistics over time.

For examples and more information on the reports, see https://www.mnpals.org/system/files/UMWUGReportsPresentation-1.pdf. There is also a calendar that has recommendations on when to run various reports.

Islandora
A session on Islandora, hosted by Linda Richter and Alex Kent (PALS Office), was scheduled on May 7, but was interrupted by a fire alarm. This session is being held at the October 23 User Group Meeting

Data Cleanup Webinar
On October 7, from 10-11:30, Bobby Bothmann (Minnesota State University, Mankato) and Alex Kent presented a virtual session on strategies for cleaning up data in your system. We discussed various methods to attack this difficult and daunting issue.

Topics included:
• Downloading a set of records from Aleph to edit in MarcEdit
• Finding possible missed title changes
• Correcting URLs or other MARC data
• Finding duplicate records by matching OCLC numbers
• Introducing File-90 as a way to load edited records into Aleph
• Introducing Upload/Download Files feature in Aleph
MarcEdit is a free MARC editing tool that can be found by searching for “MarcEdit” on Google.

Relevant documentation can be found in the PALS Support Center at https://pals.custhelp.com:
- Answer 3529 – Correcting records in MarcEdit
- Answer 3656 – Finding missed title changes
- Answer 3657 – Finding duplicate records by matching OCLC numbers
- Answer 3568 – Upload/Download files

Validation Tables
Validation tables were changed to comply with the latest update to the MARC 21 Format for Bibliographic Data, Update 18, April 2014.

New Knowledge Base Answers
There is now a Cataloging Module “Master Answer” which lists all the cataloging-related answers in the PALS Support Center. This will be updated with new answers as they are created. The answer number for this is 3648.

Documentation on the web page now also exists in the Support Center and answers were created for them. This represents the bulk of the answers created. All of the following answers were reviewed and updated, if needed.

3647 – MSU Online Inventory Process
3646 – MSU Batch Inventory Process
3561 – Aleph cataloging workflow: Basics of using the Acquisitions Module
3557 – Aleph Cataloging Module Master Answer
3650 – Converting .mrk files to .mrc files
3611 – Aleph Indexes - February 2014
3606 – Video: Aleph Version 18 Upgrade Information Session Cataloging, Holdings, Items
3604 – Video: Cataloging Question and Answer Session January 2009
3607 – Video: Cataloging Basic Module Navigation Web Training Aleph Version 17
3601 – Video: Basic Cataloging in Aleph: Introduction for New Employees Version 21
3609 – Video: Aleph 17 Cataloging Q & A
3608 – Video: Aleph 17 Cataloging Advanced Module Navigation
3605 – Video: Summary Holdings Training
3603 – Video: Introduction to Cataloging, Part 2
3602 – Video: Introduction to Cataloging, Part 1
3589 – Creating a direct URL to LC Authority Files online
3594 – Setting up “Connect to Libraries” from Cataloging Module
3593 – Aleph cataloging tips and tricks
3592 – Aleph reports for cataloging purposes
3591 – Aleph Overview Diagram
3590 – Libraries/Databases and Indexing Order
3588 – Advanced Aleph: Fixed field indexing; using ccl for pre-defined searches; analytic records and LKR fields; templates; moving item records, order records, and subscription records
3587 – Procedures for boundwiths
3572 – Aleph Version 21 Staff User’s Guide - Items (Ex Libris Documentation)
3576 – Cataloging Question and Answer Session January 2009
3569 – Prediction Patterns Aleph Version 16
3586 – Creating and Printing Batch Service Files from the Aleph Cataloging Module
3585 – Creating a holding record
3584 – Step by step instructions for creating a new titles list
3583 – Aleph Version 17 Cataloging Advanced Module Navigation
3582 – Cataloging Basic Module Navigation Aleph Version 17
3581 – Aleph Version 18 Upgrade Information Session Notes Cataloging, Holdings, Items
3580 – Steps to send your Aleph holding records to OCLC's Local Holdings Record Updating Service (LHRUS)
3579 – LHR (Local Holding Records) for OCLC: MARC Tag Fields needed in the MnPALS Libraries' Serial Holding Record
3578 – Summary holdings FAQ
3577 – Using DialogDevil to Automate OCLC Exports
3575 – Aleph Version 19 upgrade information Session Notes: Cataloging, Holdings, Items, Indexing
3574 – Detailed guide to adding new collection codes and setting up automatic creation of holding and item records
3573 – Bib records in Aleph: Clarification of format and type
3571 – Aleph Version 21 Staff User's Guide - Cataloging (Ex Libris Documentation)
3570 – Items Aleph Version 18
3568 – MARC holdings in Aleph
3567 – Triggers
3566 – Importing Records into Aleph Version 17
3565 – Exporting from OCLC CatExpress
3564 – Exporting from OCLC Connexion Browser
3563 – Exporting from OCLC Connexion Client
3562 – Aleph Version 18 Cataloging Module Functional Training Guide
3560 – Aleph cataloging workflow: the basics
3559 – Aleph cataloging monographic workflow diagram
3558 – Tips (shortcuts) on getting around Aleph Cataloging
3556 – Period stripped between $a and $i in name/title headings
3555 – Aleph database (library) types
3554 – Basic Cataloging in Aleph Introduction for New Employees Version 21
3553 – Cataloging Basic Module Navigation Web Training Aleph Version 17
3562 – Issues when creating hold requests for Aleph from OCLC
2285 – ADM and SYS numbers
3215 – Title Browse Search bib record that displays in the WebOPAC
3611 – Aleph Indexes - February 2014
2481 – Items Global Change Collection dropdown menu
2346 – Search Holding Record by Sublibrary and Collection
3325 – Suppressing holdings records
3119 – PST field on a bibliographic record definition?
3345 – Add large records so they appear in the OPAC and are indexed
2364 – Catalog directly from OCLC to Aleph
2987 – Aleph Indexes
2503 – Fields used for item sorting
2414 – Using call number to find an Item
3470 – Bibs without ADMs or HOL records report
3122 – Z39.50 Gate for the GUI Client
3607 – Video: Cataloging Basic Module Navigation Web Training Aleph Version 17
3272 – Print reports from the Retrieve Catalog Records (ret_01) service for Bib records (SYS01)
3604 – Video: Cataloging Question and Answer Session January 2009
3242 – Inventory Marking Print Report at End of Session
3606 – Video: Aleph Version 18 Upgrade Information Session Cataloging, Holdings, Items
3271 – Drag and Drop ADM records
Training Sessions Given
- File 90 / Automatic Creation of Holding and Item Records training for Winona State University – July 25, 2014
- Aleph OPAC and Basics of Bib Record web session for Leech Lake Tribal College – May 9, 2014
- Day of Cataloging Training for Leech Lake Tribal College – July 11, 2014
- File 90 training for Saint Mary's University – April 2, 2014
- Data Cleanup Strategies with Bobby Bothmann – October 7, 2014

Status of New Aleph Customers
Minnesota State Services for the Blind
- Helped staff at State Services for the Blind clean up their data, which has been sent to OCLC to get MARC records for import into Aleph
- Will be training State Services for the Blind and DEED Library on Aleph Cataloging

Leech Lake Tribal College
- Trained staff on Aleph Cataloging

Circulation – Susan Dueis

Workday
The Circulation and Interlibrary Loan Workday was held on April 10, 2014. The session materials are posted on the PALS website under Circulation and Interlibrary Loan Workday: April 2014 at the following URL: https://www.mnpals.org/content/circulation-and-interlibrary-loan-workday-april-10-2014.

Patron Record Deletion Process for 2014
In mid-October, we ran the annual process to delete patron records that have been expired prior to September 1, 2013. This year, there were 277,680 records that were marked to possibly delete (if they had no current activity). Please note, the patron deletion process does not impact the Aleph funding formula, as we only count UNEXPIRED patrons for that formula.
ISRS PLIF Check for Check Digit Compliance - Reminder
For MnSCU campuses, ISRS has had a check in place since May 2010 to check barcodes for a valid check digit as the fourteenth digit. Barcodes not complying are not sent through the PLIF load, to be loaded into Aleph. We are recently hearing from some campuses that non-compliant barcodes are being generated, so we are reminding campuses that no matter how patron barcodes are created (whether through a vendor or with a datacard machine, etc.), the fourteenth digit MUST be a check digit calculated with the modulus-10 algorithm. If you know of issues on your campus with barcodes not being populated into Aleph, check with the appropriate people on your campus to make sure the patron barcode contains a mod-10 check digit as the last digit.

New/Updated Circulation Reports/Services
Two new services/reports have been moved to Aleph production recently. They are:

- **Priv-31 Identify Offsetting CR/DB Cash Transactions Report**
  As discussed in the Circulation/ILL Workday session, “Cleaning Up Cash Charges for Lost Items”, a tab 100 setting for LOST-LOAN-CREDIT-METHOD can result in offsetting, unpaid credits created when a billed item is returned. Even though the effective cash balance is zero, these offsetting credit/debit pairs remain “unpaid”, which can prevent expired patrons from being deleted. We created this service to identify matching pairs of offsetting, unpaid credit and debit cash transactions, so they may manually be cleared up. See the service help for more information.

- **Priv-32 Loan Stats by Tech ID by Event Date Range**
  The idea of using library data to relate to student outcomes has been discussed in various conference, User Group and Workday sessions. We developed this service to generate circulation loan statistics by patron Tech/Registration ID, to be used in student outcome studies. See the service help for more information.

  Both of these services may be found in both the Circulation and Cataloging modules, under Services>Custom Services. They must be run in your XXX50 library.

  Additionally, the **Priv-21 Titles/Items with Circ Events by Call Number/Date Range** had the item price added to the output of the Items report.

New/Updated Knowledge Base Answers (go to the PALS Support Center at [http://pals.custhelp.com](http://pals.custhelp.com) to view).
3518 – Aleph reports for Academic Libraries Survey (from 2013 UMWUG session)

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**Course Reserves – Carrie Curie**

**Beginning and End of the Semester Course Reserves Office Hours**
One End of the Semester Office Hour on May 12, and two Beginning of the Semester Office Hours on August 18 and September 10, were offered this past year. Each session had a handful of attendees. Topics discussed ranged from best practices, local workflows, and tips.

**Course Reserves Master Answers and Short Training Videos**
Two Master Answers have been created in the PALS Support Center to provide quick access to Course Reserves information:

- **Aleph Course Reserves Documentation and Training** (Answer 3497) – This answer has short how-to videos, as well as, written documentation.
- **Aleph Course Reserves FAQs** (Answer 3552)
**Interlibrary Loan – Sonja Eilertson**

**Circulation and Interlibrary Loan Workday**
The Circulation and Interlibrary Loan Workday was held on April 10, 2014. There were 51 attendees. The workday evaluations are posted on the PALS Forum at [https://www.mnpals.org/smfforum/index.php?topic=2056.0](https://www.mnpals.org/smfforum/index.php?topic=2056.0)

The presentations are posted at [https://www.mnpals.org/content/circulation-and-interlibrary-loan-workday-april-10-2014](https://www.mnpals.org/content/circulation-and-interlibrary-loan-workday-april-10-2014)

**New Library**
Leech Lake Tribal College has joined the MnPALS Consortium. Hannah Buckland is the Director of Library Services and the primary ILL contact person. They began borrowing materials this fall and will begin lending materials at a later date. Their MnPALS ILL code is LLTI. Their OCLC code is LEECH. They have USPS delivery. They are not direct borrowers. They are currently borrowing through Minitex and will soon start to lend through Minitex. Welcome to ILL!

**No Longer Processing ILL Requests**
Minnesota West Jackson (MWJI/XQJ) is no longer processing borrowing or lending ILL requests. Central Minnesota Libraries Exchange (CMLI/MSTC) is no longer processing borrowing ILL requests.

**Minitex on MnPALS server**
Minitex ILL units of Minitex (MII) and University of Minnesota Twin Cities (MNU) are on the MnPALS server since December 2013.

If you have active requests with MINITEX (U of MN server) or University of Minnesota TWIN CITIES (U of MN server) we need to clean these requests up.

<table>
<thead>
<tr>
<th>MINITEX (U of MN server)</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Minnesota TWIN CITIES (U of MN server)</td>
</tr>
</tbody>
</table>

When a request is with IMII or IMNU, Minitex staff are unable to view or update these requests. If you have requests in categories such as Shipped, Returned, Overdue or any other active category enter an incident into the PALS Support Center and we can work on cleaning up these requests.

**Interlibrary Loan “Request Log” display order change**
At the 2014 Circulation and Interlibrary Loan workday session “ILL Sharing: how work actually “flows” through your workspace”, we talked about how the request updates display in the “Request Log”. We had been displaying request updates with “Action date” updates at the top of the “Request Log”. This could make reading through interlibrary loan updates more difficult because some updates were out of date order because they had an “Action date”.

The group decided that displaying the request updates in chronological order would make it easier to review request updates.

The display order on the interlibrary loan “Request Log” has been changed to chronological date and time order for updates.
New Lending Slip
There was a suggestion to reformat the lending slip to be similar to the lending slip Minitex uses. After a discussion in the forum https://www.mnpals.org/forum/index.php?topic=2056.0 the lending slip was reformatted to be similar to the lending slip Minitex uses.

New Replacement Lending Slip
While discussing changes to the lending slip, the problem of the lending slip not being returned with the item was discussed in the forum https://www.mnpals.org/smfforum/index.php?topic=2056.0. Occasionally, patrons don’t bring the original lending slip back with the item. An additional form “Replacement Lending Slip” was added under the Borrowing “Print” button. The Aleph ILL unit code is displayed on the slip, not the delivery code.

The original lending slip is the always preferred to the replacement lending slip.

Aleph Version 22
We are currently on Aleph Version 21. When we move to Aleph Version 22 the following additional functionality will be available to use: additional fields of “Series” and “Publication Place” have been added to a borrowing request “Bibliographic Details” tab. This was an IGeLU enhancement request.
A new button “Duplicate” has been added to the ILL Borrowing Request. When you click the “Duplicate” button, a new ILL borrowing request form is displayed with select information taken from the original request. You can modify the request before submitting it. This was an ELUNA enhancement request.

The number of ILL unit “Pickup Locations” has been increased to 100. The number of “Circulation sublibraries” that can be assigned to an ILL unit has been increased to 100.

**Searching University of Minnesota**
The University of Minnesota is on Alma. We are using an Alma z39.50 search for ILL “Locate” and for “Search” functionality. We have been working with the University of Minnesota staff and Ex Libris to improve the z39.50 search results. Sonja Timmerman, Gustavus Adolphus College, has been providing examples of “Locate Failed” requests, that when a “Locate” is done again, are found at the University of Minnesota. If you have examples, let me know the ILL request number.

The University of Minnesota electronic resources are not assigned to a specific campus. Electronic resources are part of the overall University of Minnesota collection. For Minitex staff to be able to fill from electronic resources, their University of Minnesota Twin Cities ILL unit (MNU) is defined as all University of Minnesota collections. This definition allows Minitex, as MNU, to be able to get and fill electronic resource requests. It also means that MNU could get a request for a book that is owned at one of the other campus locations. Minitex has started an enhanced verification process [http://www.minitex.umn.edu/Communications/Enews/2014/156.aspx#enhanced](http://www.minitex.umn.edu/Communications/Enews/2014/156.aspx#enhanced) to quickly identify the items that are on the Twin Cities campus. They will “Answer Unfilled” on requests that are owned on a different campus.

You may notice MNU responding “Answer Unfilled” to more requests since they are getting requests for items not owned at the Twin Cities location. If you use Aleph “Search” functionality and search the Twin Cities location you may get results for items that aren’t actually on the Twin Cities campus. At this time, you don’t need to make any changes to your potential supplier lists or your ILL processing.

**Alma ILL Testing and Configuration**
We have started to test interlibrary loan between Aleph ILL and Alma ILL. The University of Minnesota is using Ex Libris’ Alma software and the University staff and Minitex have begun to test out Alma ILL. The University of Minnesota Crookston ILL unit and the University of Minnesota Morris ILL unit are configured on our server and the staff have begun to send borrowing requests to Minitex. We continue testing between Alma and Aleph ILL. As Alma functionality improves we will start a limited exchange of borrowing requests from the University of Minnesota Crookston and Morris Alma ILL units to MnPALS ILL units Bemidji State University, Minnesota State University Moorhead, and Minnesota State University, Mankato.

**MnLINK Gateway RFP**
MnLINK Gateway has begun an RFP process for a replacement for both the public search interface (ZPortal) and the interlibrary loan software (VDX). MnPALS is a server site on the MnLINK Gateway and our catalog is searchable along with the other server sites [https://www.mnlinkgateway.org/zportal/zengine?VDXaction=ZSearchSimple](https://www.mnlinkgateway.org/zportal/zengine?VDXaction=ZSearchSimple)

The VDX ILL software is primarily used by public libraries to exchange ILL requests.

As the RFP process continues, look for announcements about opportunities to view vendor demonstrations.
Web OPAC – Perry Madden

New Available Item Process Statuses
PALS tech staff adapted functionality that Ex Libris had put into Aleph version 17 in preparation for integrating Primo. Aleph creates an “Availability Status” that can be incorporated into the Web OPAC. On each of the local web OPACs, we replaced the Library (Owned/Out) column of the Brief list display with an Available column.

In the Available column, 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).

Over the last year, two new item statuses have been designated at Available:
- CQ -- May 2014
- NB – September 2014

Further details can be found at https://www.mnpals.org/content/item-process-status-and-availability

Aleph Version 22 OPAC Changes
At this time, there do not appear to be any significant changes expected for the Aleph (Classic) Web OPAC when we update to Aleph version 22.

Systems – Dan Honetschlager

Trainings
One institution received individual Aleph Systems Training.

New/Updated Functions in Aleph 22 to Be Aware Of
- ‘Print Preview’ procedure has changed in Aleph Version 22.
- ‘E-Mail’ will now allow sites to define the security method to communicate between Aleph and their SMTP mail server. Security methods are basic level (none), SSL, or TLS; i.e., sites that used mail service provided by Gmail need to define SSL or TLS security.

Other Products/Services

EZproxy – Dan Honetschlager

StarID
If you are a MnSCU institution that subscribes to EZproxy via PALS, you can have your patrons use their StarID to log into the databases. Most institutions have this process in place. If you have not had this added, let the PALS office know and we will get it in place for you.
Islandora – Alex Kent

Islandora: An Open Source Digital Repository Service from PALS
Are you starting to think about what to do with your institution’s special collections? Are you trying to figure out how to make your unique items available to more users? Are you looking for an institutional repository? Are you trying to find a digital asset management system for your digital objects?

PALS offers a solution: **Islandora.**

Islandora is an open source best-practices framework designed to help institutions and organizations manage and discover digital assets. Islandora is based on other open source tools, including Drupal content management system, Fedora repository software, and SOLR search platform. Originally developed by the University of Prince Edward Island’s Robertson Library, Islandora is now implemented and contributed to by an ever-growing international community.

**Islandora Features Include**
- Customizable user interface
- Full text searching
- Real time indexing
- Automatic processes that generate technical metadata, access and use copies
- Secure data storage
- Streaming video
- Support for compound objects
- Support for a wide variety of formats

**Current Islandora Partners**
Working with Islandora and the community has convinced the PALS office that Islandora is a viable open source option for your digital asset management needs. We formed partnerships on Islandora projects with **Southwest Minnesota State University, Minnesota State University, Mankato** and **The College of St. Scholastica**. PALS also worked with the **Minneapolis College of Art and Design** during a test development project.

**Southwest Minnesota State University** has digitized their student newspapers and is currently adding them to their repository.

We have finished migrating over 7,000 **Minnesota State University, Mankato**’s photographs from ContentDM to Islandora and are also working on uploading their student newspapers.

We held our first planning meeting with **The College of St. Scholastica** and are very excited to begin work with them to build their repository. Kevin McGrew, Director of The College of St. Scholastica Library states: “**We’ve been working with PALS to begin using the Islandora repository on our campus. We are genuinely excited to begin using it to make all kinds of documents across many different formats accessible to the St. Scholastica Community.**”

**Islandora Community**
Islandora has an active open source community that provides documentation and other resources. To learn more about the community, you can visit the Islandora web site and Islandora Users Google Group.
- Islandora web site: [http://islandora.mnpals.net](http://islandora.mnpals.net)
- Islandora Google Users Group link: [https://groups.google.com/forum/?hl=en#!forum/islandora](https://groups.google.com/forum/?hl=en#!forum/islandora)
Demonstration Site
You can view Minnesota State University, Mankato’s customized repository at http://arch.lib.mnsu.edu. If you want to try out Islandora for yourself, visit the Islandora sandbox. These sandbox environments illustrate the basic functionality of Islandora's latest releases. They are refreshed daily to the same base image. There are sandbox versions built on Drupal 6 and Drupal 7. At PALS we are working with the Drupal 7 version. You can see a list of sites using Islandora at: http://islandora.ca/islandora-installations.

For more demos of PALS’ Islandora services in their “out of the box” incarnations, see http://islandora.mnpals.net.

Fully Customizable Repository
A strength of Islandora is that it can be tailored to meet your specific needs in all areas – the user interface, metadata description, access, searching, and display. Our services will enable you to focus on figuring out your needs and the content for your repository. PALS focuses on the technical aspects of Islandora and helps guide you through the process of implementing your repository. We encourage you to ask about any features or abilities you might want, and we’ll do our best to implement them.

Support Services
As part of our Islandora services, PALS staff will work with you to plan the repository and each collection, determine the appropriate metadata standard and elements to use, and provide support throughout the configuration and ingest phases of the project. Once your repository is operational, PALS will offer ongoing support and consultation services to assist you in using Islandora functionality to its fullest.

PALS offers an online support center through which customers can search for answers, ask questions, or report problems. Additionally, the PALS support and training staff is available by phone or e-mail.

Contact
For more information about Islandora services provided by PALS, please contact the PALS office.

MnPALS Plus and PALSdiscover – Perry Madden

Digital Sets
PALS loads complete sets of records for digital resources into MnPALS Plus and PALSdiscover. We provide unique URLs for each library as needed for authentication, adding proxy strings and account information as required. These record sets are kept up-to-date by PALS and will not be loaded into Aleph unless needed for inclusion in commercial discovery systems.

Digital Sets we are currently loading at a cost of $300 annually for each record set:
- Films on Demand
- Credo Reference
- ebrary
- Alexander Street Press
- Oxford Reference
- EBSCO Academic eBook Collection
We also have digital sets that we will load for you at no charge
- MN Legislators: Past and Present
- EBSCO Ebooks (NetLibrary books purchased for MN libraries by Minitex)

PALS may also load other record sets upon request. Contact the PALS Office for further information.

NEW Answer 2654 in the PALS Support Center tracks when we update these digital records sets.

Upgrade to VuFind 2.3 New Features and Fixes
PALS staff are working to update MnPALS Plus and PALSdiscover. These products run on the Vufind software from Villanova University.

Currently working as expected:
- Search
- Browse
- Summon API
- Mobile (Responsive) Interface
- Individual institution selection
- Login using barcode
- Hold and Interlibrary Loan requests

Still under construction/testing
- Daily Database Update Process
- Web interface tweaks
- Setting up each library’s development site
- Login using StarID or local authentication

Our current planning is to have the individual virtual hosts and sites set up sometime in November, and as long as there are no complications, moving this updated software to production in January 2015. More details will be forthcoming.

Course Reserves: New Sort by Title
In MnPALS Plus, for those libraries using Course Reserves, we have added a new Sort option, by Title. Previously, the only options were Relevance, Department, Course, and Instructor.

PALSconnect Linker – Perry Madden

New Features in PALSconnect Linker
The CUFTS production server, which includes PALSconnect ERM and PALSconnect Linker, was upgraded to a new version on April 26, 2014. Some of the new features in this version include:

- New version of the CJD$ title list called CJDB4 with better styling and a responsive layout
- Added start of subject search to CJDB
- Swapped 0-9 to end of A-Z list
- Added tag search to CJDB Journals
- Added "Selected Journals" screen to CJDB
- Added LCC subject browse screen to CJDB
Note that it is your option whether to implement the new CJDB4 title list. To access the CJDB4 interfaces, use [http://linker.mnpals.net/CJDB4/XXX/browse](http://linker.mnpals.net/CJDB4/XXX/browse), where XXX is your institution symbol.

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**PALSconnect ERM – Dee Nolan**

**Libraries subscribed to the PALSconnect ERM**
- Century College – CEN
- Dakota County Technical College – DCT
- Department of Employment & Economic Development (DEED Library) – DTE [NEW]
- Hennepin Tech College – HTC
- Lake Superior College – LSC
- Minneapolis Community & Technical College – MCT
- North Hennepin Community College – NHC
- South Central College, North Mankato – SCC
- Southwest Minnesota State University – SSU

**ERM New Version 1821**
The PALSconnect ERM was upgraded to Version 1821 April, 2014. The upgrade included
- A new version of the CRDB resource list called CRDB4 with better styling and a responsive layout
- Four new MARC related fields under the Admin tab for storing information about MARC records for resources
- Better searching for providers, similar to licenses
- The ability to search for contract end date ranges on the front ERM search page

**New Knowledge Base Answers**
3523 – Removing vendor field from display in CRDB4
3524 – Changing Electronic Resources to Online Resources
3525 – Changing facet screen in CRDB4
3526 – Removing Google Scholar and adding Linker to bottom of CRDB4
3595 – Steps to flip resource URL and connect links in CRDB4
3596 – Adding a link to the “Learn More” of the CRDB4
3597 – ERM FAQs
3598 – How to make changes to the templates of the CRDB and CRDB4
3599 – Documentation on “How to Create a New ERM Record”
3600 – EBSCO COUNTER and SUSHI setup
3610 – Master Answer for ERM

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**EVERGREEN – Carrie Curie, Alexey Lazar, Simon Mai**

**PALS Connects ECRL’s Evergreen ILS to the MnLINK Gateway**
PALS Developer Simon Mai and Support Specialist Carrie Curie completed work to connect East Central Regional Library’s (ECRL) Evergreen Open-Source Integrated Library System to the MnLINK Gateway via the NCIP protocol. On October 27, 2014, this work will be turned on for ECRL. This means that ECRL library staff will only need to update interlibrary loan information once in OCLC’s software. Messages are automatically sent to Evergreen
updating the status of items owned by ECRL, creating items for items requested by ECRL patrons, and updating the status information for those requested items.

Simon built on work already done for iNCIPit. iNCIPit was originally designed to allow communication between Evergreen and the INN-Reach resource sharing software for the MeLCat libraries in Michigan and was designed for the NCIP version 1.0 standard. Simon updated it and built some new functions to support the NCIP version 2.0 standard. Like Evergreen and the original iNCIPit code, Simon’s work will be freely shared with the Evergreen library community.

The development and testing was a collaborative effort between PALS, Minitex, and OCLC. For PALS, Simon (Hieu) Mai was the programmer and Carrie Curie coordinated testing efforts. Nick Banitt from Minitex/MnLINK Gateway configured the Gateway software and participated in testing. OCLC's team of Andy Cole, Ron Corcuera, Ed Davidson, John Johnson, and Ralph Horton participated in testing, configuring the Gateway/VDX software and updating code in the VDX software to accommodate this new functionality.

**Evergreen 2014 Conference in Cambridge, Massachusetts**
Carrie Curie and Alexey Lazar attended the 2014 International Evergreen Conference in Cambridge, MA in May 2014. While there they were able to meet and interact with other members of the Evergreen community.

**Existing Customers and Marketing Activity**
PALS will continue to provide support for Evergreen to our customers: East Central Regional Library (headquarters in Cambridge, MN) and Campbell Library (East Grand Forks, MN). PALS is not actively marketing the Evergreen ILS at this time.

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**Task Forces**

**Authorities Task Force – Alex Kent**

Nothing new to report.

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**ERM Task Force – Dee Nolan**

The ERM Task Force met via a web meeting in November 2013, and February 2014. Based on topics discussed at these meetings, several enhancements were added to the ERM.

- A new grid format was added which is used to manually enter COUNTER stats into the ERM. This makes entering stats much more efficient than the previous form of entering one month at a time.
- URLs in the admin tab of the ERM resource record are now hyperlinked.
- Two new columns have been added to the ERM Resource Usage Report. The two new columns are "Views" along with percent of increase for those views and "Cost/View" along with percent of increase for cost/views. Documentation was created and sent to the PALS ERM libraries explaining how to manually add these stats so that they appear in their ERM Resource Usage Report.
MnPALS Indexing Task Force (MITF) – Alex Kent

The Task Force met on October 2. They reviewed changes – there were none during the past year. Re-indexing is scheduled to occur in November. During the October 2nd meeting, the Task Force decided to add 245 $c to the Word index. This will help narrow down searches, making it easier to find, for example, government agencies. They decided not to index any of the new RDA 3XX tags, their impact is minimal.

The Cataloging Steering Committee will ask at User Groups if there are any indexing needs.

Indexing Updates
For details on indexing, see Answer 3611. This will be updated again in January 2015, or if there are other major updates beforehand.

MnPALS Plus Working Group – Perry Madden

A meeting was held on April 21. At this meeting, members of the Working Group discussed changes to the display of MnPALS Plus and PALSdiscover.

At the 2013 Reference and Instruction User Group Business meeting, the recommendation that the Working Group update their charge was approved. The group’s charge:

• To provide oversight and guidance for the development and refinement of the open source VuFind-based products provided by PALS, including MnPALS Plus and PALSdiscover.
• To conduct regular usability testing and/or opportunities for feedback on MnPALS Plus and PALSdiscover.

At this time, the MnPALS Plus Working Group has no chairperson to assist the PALS staff in scheduling meetings. In the meantime, changes to the PALSdiscover interface have been discussed during the PALSdiscover Office Hour web meetings, and approved by consensus.

RDA Task Force – Alex Kent

In 2013-2014, PALS worked with the MnPALS RDA Task Force to make changes related to RDA in Aleph as needed. As of October 2014, Aleph supports all RDA rules. RDA relationship designators are indexed on Aleph production and development. The Indexing Task Force updated the tab_type_config table to include the RDA content, media, and carrier vocabularies as the basis for many definitions.

mPLUS supports all RDA rules.

PALS Policy on Cataloging with RDA in Aleph/mPLUS
Libraries in the MnPALS Consortium should follow OCLC’s policy regarding RDA.

OCLC RDA Policy Update
OCLC does not require member libraries to use RDA. They may switch to RDA for original cataloging on their own timetable, if they choose to switch at all. See http://oclc.org/rda/new-policy.en.html for more details.
**OFFICE TEAMS**

**MarCom Team – Deb Domek**

The members of the PALS MarCom Team (Marketing and Communications) are: Rod Bruce, Perry Madden, Alex Kent, Stephen Elfstrand, and Deb Domek, Chair.

The MarCom Team met several times over the past year. The product and services taglines on the PALS home page were revised. After several failed attempts at RFPs for Evergreen services, it was decided not to respond to RFPs outside of the region and re-evaluate the cost/benefit of providing Evergreen services.

We discussed marketing strategies for Islandora and are currently providing services to three customers. There has been a lot of interest in Islandora and several demos and presentations have been done.

We reviewed the strategic plan tasks assigned to the MarCom team to make sure we were on track and updated as necessary. We had a vendor booth at MLA this year.

We also continue to communicate pertinent information through our Forum, Mailing Lists, and the PALS home page.

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**OTHER**

**Sharing Information in the Consortium**

Have you developed good training materials for your work-study students? Do you have a unique way of using circulation statistics reports? Consider sharing what you’re doing at your library with the rest of the MnPALS Consortium. Information sharing can be as simple as an email to the MnPALS-Discuss email list (mnpals-discuss@lists.mnpals.org) or a posting on the PALS Forum (https://www.mnpals.org/smfforum).

Are you interested in learning more about how other libraries handle particular situations? Consider partnering with a similar campus for a day of job shadowing. Contact the PALS office if you need help identifying or making contact with a similar campus in the MnPALS Consortium.

**Navigating the PALS Support Center is Being Made Easier**

PALS Support Staff are creating comprehensive “Master Answers” in the PALS Support Center for Aleph and other supported products. These answers compile links to related Support Center answers, videos, or documentation based on topic or workflow. Some answers have already been made available for searching (for example, Aleph Cataloging, Aleph Course Reserves, and PALSconnect ERM); others will be added as completed. When new Support Center answers are created, links to them will be added to the related Master Answer.

To be notified when new answers are added, simply subscribe to the “Master Answer” by clicking on “Notify Me” at the bottom of the answer. For an example of a “Master Answer” check out answer 3557.