PALS Report

for the

Consortium of MnPALS Libraries
User Group Meeting

November 2, 2015
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Aleph Subsystem Reports

Acquisitions/Serials – Dee Nolan

Acquisitions/Serials Workday
Combined work days were held April 9 – 10, 2015, at 7700 France Avenue South in Edina. The workday evaluations are posted on the PALS Forum Acquisitions/Serials at https://www.mnpals.org/forum/index.php?topic=2370.0

The presentations are posted at https://www.mnpals.org/content/spring-2015-user-group-workdays

Aleph Version 22

Trainings
Department of Transportation – Half day serial clean up
Minnesota State Law Library – Half-day acquisitions/serials review
Minneapolis Community & Technical College - full 2-day acquisitions training for new staff

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, SBJ, UCR
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

New Knowledge Base Answers
There is now a Acquisitions/Serials Module master answer “Acq/Serials FAQ’s” which lists all the acquisitions and serials related answers in the support center together into this master answer. This will be updated with new answers as they are created. The master answer number is 3668.
New answers created and linked to the FAQ Answer #3668 include:

3669 – Aleph Vendor Record Address
3678 – Subscription status Active or Not Active
3679 – Serial Issue Check-in Arrival Action
3680 – Serial subscription record update from serial order
3681 – No attached level-x lines
3683 - Books in Print to Aleph
3684 – Standing order vs. Serial order
3685 – Subfield $y$ combined regularity pattern
3686 – Order numbers in acquisitions order record
3687 – FAQ Serial Item Claiming
3688 – Standing Order Claiming
3701 – EDI Invoicing with Aleph and EBSCO
3717 – Order Change Alert

Booking – Sonja Eilertson

Booking Staff web interface
The booking start and end time and loan start and end time were added to the staff booking web interface view. In the screen capture below, the booking for Test, Patron began at 10:33 and ends at 12:00. The background of the booking is yellow since the time is 10:39 and the patron is late to pickup the booking. The booking for Demo, Suzy has a gray background because the booking from 11:00-12:30 is in the future. The booking for Demo, Sonja has a blue background because the item has been loaned to the patron with a loan time of 10:34-12:33.
Cataloging – Alex Kent

Steering Committee Update

1. RDA Task Force – At User Group 2014, the Cataloging User Group discussed whether to disband the RDA Task Force. No action was taken, but the User Group agreed to revisit the issue at User Group 2015. The Steering Committee subsequently consulted the “Task Forces Policy Document,” which states that a standing Task Force must decide when it has completed its charge, at which time the convener of that Task Force must provide written notification of cessation to the Group(s) which established it. No action is required by the Cataloging User Group. The Steering Committee contacted the chair of the RDA Task Force and requested that the RDA Task Force meet to review its charge.

2. Workday 2015 – The Steering Committee agreed to participate in, and helped plan, a joint Workday on April 9-10, 2015. At the Workday, Bobby Bothmann, Sarah Quimby, and Alex Kent taught the hands-on session “MarcEdit and Aleph File 90 Record Loader,” which covered basic skills and strategies for using MarcEdit with Aleph to make changes on large sets of MARC records. Alex Kent also presented the session “Cataloging Version 22 New Features.”

3. Incorrect Subject Heading Flip – Aleph was incorrectly flipping the subject heading “C (Computer program language)” to “C# (Computer program language).” This was resolved by turning off the UPD flag on authority record #333122, which will prevent this incorrect flip in the future. Any headings that were incorrectly flipped will have to be fixed manually. The root cause of this problem is Aleph’s normalization routine. Under the hood, when normalizing headings before comparing them, Aleph replaces the # (pound sign) character with a space rather than leaving the # character in place as dictated by the latest NACO normalization standard. The Steering Committee consulted with PALS staff, the Authorities Task Force, and the Indexing Task Force. In light of the relatively short time horizon for Aleph, potential unintended consequences of changing the Aleph normalization tables, and the time commitment required for testing, the Steering Committee decided not to make any changes the Aleph normalization tables.

Death Date Force Flipping Project
The MnPALS Authorities Task Force has been looking at a solution for when personal name headings in the authority file have had death dates added even after a significant number of bib records already in PALS contained the old form of the heading. This occurs only with records that have an open date/birth date. It is LC/NACO policy that cross-references for former headings with open dates are not added to authority records as 400 fields (see www.loc.gov/catdir/cpso/deathdates.pdf), so these updated headings do not automatically flip to the current form.

Example: Lumet, Sidney, $d 1924-2011 (Authorized heading)
Lumet, Sidney, $d 1924- (57 headings in the MnPALS Union Catalog)

The Task Force is considering a procedure to use Aleph’s authorities functionality to flip such headings to the authorized form by adding a 400 cross-reference to the authority record in SYS10. A procedure for doing this has been tested by Adam Marsnik and Deb Domek on the development server and has...
been found to correct all accurately tagged and constructed entries. Incorrectly entered headings and name title headings did not flip.

The Task Force is envisioning a procedure in which such personal name headings, with a large number of occurrences of an old open-date form in bibliographic records, are identified by member libraries and submitted to a project team for review. The team would determine a list of headings to include in the project and a timetable for executing the edits to the authority records that will not interfere with normal Aleph functioning during workdays. After indexing and flipping are completed, added 400 fields would be removed and a local note added to the NAR indicating that the record has undergone this procedure.

The last step would be to notify Consortium members that this procedure has taken place and to indicate possible cleanup of incorrectly entered or miscoded names and name/title headings that the procedure did not remedy.

Data Cleanup Answers in PALS Support Center

These answers may help to clean up data. One thing to consider is conducting inventory on your collections – this will help point out areas that need cleanup. Search for “inventory” in the Support Center. Some inventory related Answers are listed below. Please read Answer 3514 before conducting inventory.

- Inventory in Aleph: Instructions and Tips: Answer 3514
- Online Manual Inventory Management: Answer 3199
- Batch Inventory Management: Answer 3225
- MSU Online Inventory Process: Answer 3647
- Using the Shelf reading report (item-04) to inventory a shelf range of items: Answer 3043
- Aleph Online Inventory as used by Century College - provided by Randi Madisen: Answer 3412
- Finding where we left off scanning online inventory: Answer 3408
- Shelf reading report (item-04) Inventory missing report: Answer 3349
- Inventory dates: Answer 3666
- Online inventory error messages: Answer 3515
- Collections Using Local Call Numbers for Inventory: Answer 3243
- Inventory report problems: Answer 3073
- Inventory Marking Print Report at End of Session: Answer 3242
- Look at old SRNs to find collection and call number range: Answer 3409
- Shelf Reading Report Missing Items: Answer 3154
- Resolve unfinished SRN: Answer 3407

Lori Pesik continues a series of “Cataloging Maintenance Tips of the Week”, which can be found in the PALS Support Center as answers. These are related to cleaning up your catalog to match RDA. You can search for “Lori Pesik” in the Support Center to find them all. They are also listed below.

- Lori Pesik's Catalog Maintenance Tip of the Week No. 1: violoncello(s) -> cello(s): Answer 3691
- Lori Pesik's Catalog Maintenance Tip of the Week No. 2: arr -> arranged: Answer 3692
- Lori Pesik's Catalog Maintenance Tip of the Week No. 3: acc. -> accompaniment: Answer 3693
- Lori Pesik's Catalog Maintenance Tip of the Week No. 4: unacc. -> unaccompanied: Answer 3694
Lori Pesik’s Catalog Maintenance Tip of the Week No. 5: Dept. -> Department: Answer 3695
Lori Pesik’s Catalog Maintenance Tip of the Week No. 6: Koran -> Qu’ran: Answer 3696
Lori Pesik’s Catalog Maintenance Tip of the Week No. 7: cent -> century: Answer 3697
Lori Pesik’s Catalog Maintenance Tip of the Week No. 8: fl -> active: Answer 3698
Lori Pesik’s Catalog Maintenance Tip of the Week No. 9: ca. -> approximately: Answer 3699
Lori Pesik’s Catalog Tip of the Week No. 10: d. YYYY -> -YYYY: Answer 3702
Lori Pesik’s Catalog Tip of the Week No. 11: b. YYYY -> YYYY-: Answer 3703
Lori Pesik’s Catalog Tip of the Week No. 12: b. YYYY and d. YYYY in $d: Answer 3705
Lori Pesik’s Catalog Maintenance Tip of the Week No. 13: Selections -> Works. Selections: Answer 3710
Lori Pesik’s Catalog Maintenance Tip of the Week No. 14: English. Selections -> Selections. English: Answer 3712
Lori Pesik’s Catalog Maintenance Tip of the Week No. 15: b. YYYY -> YYYY-: Answer 3714
Lori Pesik’s Catalog Maintenance Tip of the Week #16: Month abbreviations in personal names: Answer 3722

Additional Data Cleanup Answers

- Data cleanup webinar (Cataloging Virtual Workday 2014): Answer 3664
- Finding duplicate records by matching OCLC numbers, October 7th, 2014
- Finding missed title changes – Data cleanup webinar: 3656
- Bibs with multiple Holding records (pri-07): Answer 3161
- MarcEdit and Aleph File 90 Record Loader Workshop: Spring 2015 Workday Workshop (Bobby Bothmann, Sarah Quimby, Alex Kent): Answer 3708
- “x” call number cleanup on the SYS60 Holding Record: Answer 3219
- Bib records with 13-digit ISBNs – 2010 Cataloger’s Workday session: Answer 3393
- Items never loaned: Priv-14, Priv-16, or Priv-21: Answer 3157

One search that will return good answers is “Generating Reports to Identify Records for Bib Cleanup”.

There are more answers that may help your situation. Be sure to conduct research in the PALS Support Center: https://pals.custhelp.com/app/answers/list to help with your data cleanup efforts.

We would like to stress the importance of conducting inventory to help identify data cleanup needs in the catalog.

Status of New Aleph Customers
Minnesota State Services for the Blind

- Delays were experienced with this project, but records from SSB should be processed by OCLC soon.

Dunwoody College of Technology

- Trained staff on Aleph Cataloging. They are starting a new “Design Library” for architectural resources.
Training sessions

- Conducted four hour workshop with Bobby Bothmann and Sarah Quimby at Combined Workdays April 9th 2015
  - On File 90 loader/MARC edit
- Presented at Combined Spring Workdays: Using statistics via CCL queries with Dave Woulu
- Trained Dunwoody College of Technology in Aleph Cataloging with Carrie Curie, June 4th 2015
- File 90 trainings
  - Randi Madison May 15th 2015
  - John Daniels, Bill Vann, Elissah Becknell October 6th, 2015
- A reminder: Training is required before using File 90. Contact PALS if interested.

Circulation – Carrie Curie and Susan Dueis (retired)

Workday
The Circulation Workday was part of the Spring 2015 User Group Workdays for all of the User Groups that was held on April 9 and 10, 2015 at Edina. The session materials are posted on the PALS website under Spring 2015 User Group Workdays at the following URL: [https://www.mnpals.org/content/spring-2015-user-group-workdays](https://www.mnpals.org/content/spring-2015-user-group-workdays).

PALS Staffing Updates
In mid-June, Susan Dueis retired and was replaced as the Circulation Support Specialist by Carrie Curie.

Patron Record Deletion Process for 2015
In mid-October, we ran the annual process to delete patron records that have been expired prior to September 1, 2014. This year, there were 229,097 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.

Preferred Name for MnSCU institutions
In late-September, the team at ISRS made the changes necessary for the preferred patron name to be sent to Aleph from the ISRS database. For those students/faculty/staff who have had their requests approved, the preferred name will be in Aleph in place of the legal name.
Course Reserves – Carrie Curie

Course Reserves Master Answers and Short Training Videos
Reminder! There are two Master Answers 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

Combined Workday
A combined workday was held on April 9-10, 2015. The workday evaluations are posted on the PALS Forum at https://www.mnpals.org/forum/index.php?topic=2370.0

The presentations are posted at https://www.mnpals.org/content/spring-2015-user-group-workdays
The presentation “What’s New in Version 22” for circulation and interlibrary loan can be found at this link https://www.mnpals.org/system/files/CIRC_ILL_New_in_22.pdf

Aleph Version 22
We moved to Aleph Version 22 on April 10-11, 2015. The move to version 22 added the ability to “Duplicate” borrowing requests, “Check-in” a lending request when there is no item record and improved the lending search by “Requester Reference number”. If you want to review the version 22 updates this document provides an overview https://www.mnpals.org/system/files/NewInAleph22.pdf

MnLINK Gateway selects new software
MnLINK Gateway has selected a replacement software for both the MnLINK Gateway public search interface and the interlibrary loan software. OCLC WorldCat Discovery will provide the public search interface and VDX will continue as the ILL software until there is a transition to a customized version of OCLC WorldCat Resource Sharing.

MnPALS libraries can participate in an OCLC Reclamation. Information about the OCLC Reclamation can be found at https://news.minitex.umn.edu/news/resource-sharing-delivery

Clean-up requests
If you have borrowing or lending requests that you are not able to update enter in a PALS Support Center ticket and we can work on cleaning up the requests. It is always a good idea to keep up to date on request processing; but especially now with the potential move to a different software we want to clean up existing requests.

If you have requests with MINITEX (U of MN server) or University of Minnesota TWIN CITIES (U of MN server) we need to clean these requests up too.
The requests may display like this screen capture

<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.

**Alma ILL Testing and Configuration**
We continue 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 are testing Alma ILL. The University of Minnesota Crookston ILL unit and the University of Minnesota Morris ILL unit are configured on our server and the U of MN Morris staff have begun to send borrowing requests to Minitex. We continue testing between Alma and Aleph ILL.

**Web OPAC – Perry Madden**

**New Available Item Process Statuses**
Several years ago, PALS tech staff adapted functionality that Ex Libris had put into Aleph 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, no new item statuses have been designated at Available:

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

**Aleph Version 22 OPAC Changes**
There were no significant changes for the Aleph (Classic) Web OPAC when we updated to Aleph version 22 in April 2015 or in any of the Service Packs that we have installed since then.

**Systems – Dan Honetschlager**

**Trainings**
Ridgewater College-Willmar received two days of Aleph Systems Training
Minnesota State University, Moorhead received a half day Systems Refresher Training
Minnesota State Community and Technical College received a half day Systems Refresher Training
Dunwoody and Mn State Law Library received two days of Aleph Systems Training
Combined Workday
A combined workday was held on April 9-10, 2015 at 7700 France Avenue South in Edina. The presentations are posted at https://www.mnpals.org/content/spring-2015-user-group-workdays

Aleph Version 22
Our Consortium moved to Aleph Version 22 on April 10-11, 2015.
- The move to version 22 altered the way ALEPH interacts with the printing/export to Excel process.
- ‘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.

For more information, please review the version 22 updates found at: https://www.mnpals.org/system/files/NewInAleph22.pdf

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 Solution 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 digital asset management system designed to help institutions and organizations manage, preserve, discover, and share digital assets. Islandora is based on other open source tools, including the 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 (parent-child relationships between objects)
- Support for a wide variety of formats
- Map browse (under development)
- My favorites: Build and share (through email or social media) a saved list of favorite objects
- Piwik Statistics (track usage statistics, downloads, and more)

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 in 2014. In 2015 we formed partnerships with St. Cloud Technical and Community College and Winona State University. In total we have five partners that are members of the PALS Minnesota Islandora Community. This marks just the beginning of the growing PALS Islandora Community.

St. Cloud Technical and Community College Digital Archives Project
We first met with St. Cloud Technical and Community College in the Spring of 2015. Their initial goal for the repository was to use it for accreditation and other important college documents that have proven hard to find in the past. We started with an in-person planning meeting at SCT to define the repositories goals and mission, and to choose the first collections for it. During the rest of Spring of 2015 we helped build custom ingest forms, built their website and custom theme, and tested workflows for ingesting (adding) objects.

Into the Spring and Summer, SCT was able to ingest their important college documents and accreditation materials, as well as photographs and documents from various departments across campus. SCT currently has photographs from their 2015 Edible Book Contest (where participants made cakes that looked like books), some Athletics photographs, college catalogs, brand standards, college governance documents, and more. Vi Bergquist is the lead on the Islandora project at SCT.

"We love it (Islandora) and firmly believe it will be a very important resource for the campus in the years to come. We are capturing a lot of history of the campus and our community that could have otherwise been lost". Vi Bergquist, CIO, St. Cloud Technical and Community College.

Winona State University Digital Collections Project
PALS started working with Winona State University in the summer of 2015. Kendall Larson is the lead on their digital collections project. She met us in person in Mankato and we worked on defining the goals, structure, and initial organization of their repository. Priorities became the Paul & Ruth Watkins Art collection, a collection of photographs of artwork across the WSU campus. The next main priority
became their yearbook, the Wenonah. We have now loaded yearbooks and photographs in Winona’s repository.

After our initial meeting we worked on metadata consultation, planning, and tested ingesting. Currently Winona has the Paul & Ruth Watkins collection and yearbooks online. Our next project will be making a set of University photographs available, then possibly newspapers, and their alumni magazine.

**College of St. Scholastica “The Quarry” Digital Archives Project**
The College of St. Scholastica currently has photographs depicting college life (sports, events and student activity), photographs of faculty and staff, publications (newspapers), and Department photographs. They hope to ingest more material over the Winter and Spring from various departments across campus, and to focus on the theme of their website.

**Minnesota State University Mankato “Arch” University Archives Digital Collections Project**
“Arch” features several collections: photographs, newspapers, student magazines, yearbooks, and “Vikings Stories”, which are short interviews taken of fans and players at Vikings training camp. Over the summer we worked with MSU on their yearbooks and the “Vikings Stories” collection.

Yearbooks run from 1906-1981, and are full text searchable.

The “Vikings Stories” collection was born out of a project conducted by MSU-Mankato and the Blue Earth County Historical Society to collect oral histories of fans and players during the 50th Vikings Training Camp at MSU-Mankato. This resulted in 147 videos and all are available online in Arch.

Future plans with MSU-Mankato include working with the Athletics Department to ingest photographs, and the Theater Department to ingest their materials. MSU is also working on a collection of videos highlight stories about Homecoming 2015.

**Southwest Minnesota State University Digital Archives Project**
Southwest Minnesota State University continues adding newspapers to their repository. Their alumni newsletter, The Focus is also available. They have been a leader with Drupal theming and we can now offer a template based on SMSU’s site to all new sites as a place to start. From there new partner sites could make any customizations they want to their site.

**International 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.ca
- Islandora Google Users Group link: https://groups.google.com/forum/?hl=en#!forum/islandora

**Demonstration Site**
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 information on PALS Islandora services, see http://islandora.mnpals.net.

We also have a demo implementation available for prospective sites. If interested, contact us, and we can ingest some of your materials to help show what Islandora can do.

**Islandora Conference 2015 Report**

PALS staff members Alex Kent and Linda Richter attended the 2015 Islandora Conference at the University of Prince Edward Island, Charlottetown, PEI, Canada, August 3rd - 9th. The theme of the first Islandora Conference focused on "community" and its central importance to the further success of Islandora as a solution. The conference had 80 attendees, 28 sessions, and 16 workshops. Mark Leggot gave a keynote on the history of Islandora. The first two days of the conference features sessions on building repositories, harvesting data to aggregators, DevOps, ontologies, and more. Also our session "Strategies for Meeting Community Needs" was well received, one attendee remarking, "your presentation just confirmed...everything we've done the past few years." We ended the first day with a BBQ at the University.

The second day (Tuesday) featured more great sessions digging into Islandora's "toolbox" and providing spotlights on different Islandora sites. It proved to be rather difficult to decide which sessions to attend - this was common throughout the conference. There was a particularly great presentation from Boston College on their repository, we recommend taking a glance at their slides.

The afternoon of the second day featured sessions on migrating data into Islandora, from ContentDM and other sources. It appears that there is a lot of experience in the community migrating ContentDM material to Islandora. We ended the day with networking, a few drinks, and really hard trivia.

The third day (Wednesday) shifted focus from sessions to workshops. The most valuable takeaway from these sessions was learning to configure the Islandora OAI-PMH module, which is what you use to allow aggregators to collect data from your Islandora repository. This would be part of the process of pushing Islandora metadata to the Digital Public Library of America. We also learned more about the tool behind customized "ingest forms" (data entry forms). This tools is the amazing "XML Form Builder." Again we ended the day with a networking event at Fishbones, learning more about each other, and enjoying some great mussels and oysters. We also found out our documentation is being used in Hong Kong, and at Vassar College.

"We have definitely used your excellent documentation. My lab manager has used it to train students, and I've used it to pass to colleagues that are doing Islandora work. It's been a real time saver!" - Joanna DiPasquale, Digital Initiatiatives Librarian, Vassar College Libraries.

Thursday, the fourth day, featured more workshops. We learned more about Islandora's institutional repository functionality, which is set up with a suite of modules, known collectively as "Island Scholar." Several sites are using these at the core of customized institutional repositories, including Boston College. We also gained more expertise in how to restrict collections and objects in Islandora, and more
about Fedora 4, and upcoming changes to Islandora. Fedora 4 will greatly influence - and improve - Islandora's functionality.

Friday, the fifth day, featured the Islandora hackfest and interest group meetings. The hackfest produced a lot of useful tools, especially the integration of Altmetrics with Islandora. This was the first time interest groups were able to meet in person and there was a lot of spirited discussion regarding preservation tools and best practice, and also a lively discussion on what Islandora could do with GIS data and potential use cases.

We came away from the conference with an increased knowledge of various modules and tools in Islandora. Just as important, we got to know the community - the family - behind Islandora a lot more. Knowing members of the community and building key relationships among it are the key to the further success of Islandora. This conference strengthened our certainty that the Islandora community will remain healthy, strong, and innovative for years to come.

**Fully Customizable Repository**
A major strength of Islandora is that it can be tailored to meet 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.

Examples of new features we developed include integration of Piwik statistics, and a map browse (created by Simon Mai). Visiting our partner sites will highlight the ability to build custom themes for your site. Visit islandora.mnpals.net for quick links to our partner sites.

**Support Services**
As part of our Islandora services, PALS staff 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. In addition all PALS Islandora Community sites gain access to all features currently in use by our sites.

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

**Future Plans**
We are looking for more diverse partnerships, both in and outside Minnesota. Please contact us if you are interested in our Islandora services. One of our main goals remains a desire to provide a cost-effective State-wide Digital Asset Management/Institutional Repository platform for colleges, universities, archives, State agencies, and cultural heritage organizations in Minnesota.

We plan on offering regular “Open Chat Hours” with current sites, providing an opportunity for interested sites to talk to us and ask questions. Our first was held on September 29th.
In addition we hope to hold a user group meeting for our Islandora partners in the next few years.

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

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**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)
- **Coming Soon**: LearningExpress ebooks

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

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 updated MnPALS Plus and PALSDiscover to the VuFind 2.3 software (open source software from Villanova University) on May 31, 2015.

New features and fixes implemented during the upgrade or after:
- Mobile (Responsive) Interface for both the MnPALS Plus and PALSDiscover (Summon)
- Login using barcode, MnSCU’s StarID or local authentication (for private colleges) was implemented.
- Added hint on the login page pointing to the use of StarID as a login option.
- The 502 MARC field (Dissertation or Theses Notes) has been pulled into its own unique field in the Individual record display.
- A number of different issues with Availability Statuses were reported after the upgrade. We believe we have resolved these problems.
- For Article searching, in discussion with library staff during our PALSDiscover Office Hours, the decision was made to exclude newspaper articles in the initial search results.
- Problems with book covers were reported initially after our migration to VuFind 2.3. A change in the code that requested book covers from Amazon seems to be the culprit. PALS staff have changed the
priority so that we call from book covers from Google Books first, then Amazon if no cover is available in Google Books. This seems to have resolved most of the problems.

**Coming Soon to MnPALS Plus and PALSdiscover: Statistics!**
The most requested feature for MnPALS Plus and PALSdiscover has been some way for libraries to track their users. PALS staff are implementing the open source software, Piwik, to give libraries the opportunity to track user statistics. In order for a library to track their library users’ statistics, PALS will need to set up a unique URL for the library’s instance of MnPALS Plus. Any library running PALSdiscover already has this unique URL for your instance, but you will want to make sure all your library’s links point to the unique URL, both for using the library catalog (Books and More) and the Summon knowledge base (Articles and More).

Additional details will be available after User Groups.

**New PALSdiscover Customer**
Riverland Community College has recently agreed to implement PALSdiscover.

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**PALStrack Linker – Perry Madden**

PALStrack Linker is our open source, OpenURL Linker solution, based on the Researcher (CUFTS/GODOT) software from Simon Fraser University.

**New Features in PALStrack Linker**
PALS staff upgraded the PALStrack Linker and ERM software on March 15, 2015. The majority of changes are in the underlying programs. Here is a select list of new features for PALStrack Linker (CUFTS) included in the upgrade implemented:

- If using CJDB4 templates to display Journal A-Z list, you can use Syndetics as a source for Journal Covers. You must have purchased the Syndetics content in order to use this feature.
- Minor updates to CJDB4 template files
- There is a new Maintenance Tool (library staff) interface (MaintTool4) that we are not implementing at this time. Our testing indicates too many bugs. The original Maintenance Tool interface continues to work just fine.
- Create output file for Browzine (similar to Google Scholar). At this time, PALS staff must configure/generate this file for you.
- Reworked logic for determining end dates and embargos in Google Scholar output

**New or Updated Database Handlers in PALStrack Linker**
A number of the databases in the PALStrack Linker knowledge base have been updated over the past year, including:

- EBSCO (updates, better error handling)
- Factiva (new)
- Gale (updates)
- GeoScienceWorld (new)
- HeinOnline (updates)
• Metapress (moved to new platform, some of their titles moved to different platforms or publishers)
• Ovid (updates)
• Oxford Journals (updates)
• Project Muse (new subject collections)
• PubMed Central (updates)
• Taylor and Francis (updates)
• Westlaw (updates)

PALScollection ERM – Dee Nolan

Libraries subscribed to the PALScollection 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

Upgraded to new version March, 2015
The new release added some functionality to the COUNTER/SUSHI in particular being able to work with Release 4. A document outlining the new features and fixes can be found in the Forum under PALScollection ERM and ERM New Features March 2015.

New Knowledge Base Answers
3597 – ERM FAQs
3704 – How to get rid of unneeded CRDB and CRDB4 logins

EVERGREEN – Carrie Curie, Alexey Lazar, Simon Mai

PALS is no longer providing hosting and support services for the Evergreen ILS. The East Grand Forks Campbell Library migrated to in-house hosting in August of 2015. The East Central Regional Library system migrated to Equinox Software in September of 2015. The libraries continue to use Evergreen.

Members of PALS staff who were involved with the PALS Evergreen initiative gained valuable experience in the areas of library systems administration, software development and customer service.
Authorities Task Force – Alex Kent

2015
The Authorities Task Force met by conference call on March 6 and April 30. We confirmed that the Aleph access point flipping problems identified last year associated with RDA updates to the NACO authority file (such as Aleph erroneously moving a subfield $d to the end of a field, and flipping RDA family name descriptive access points to the LCSH form) had been resolved.

We discussed a potential project to use Aleph’s authorities functionality to flip personal name headings lacking a death date that has since been added to the authorized form by adding a 400 cross-reference to the authority record in SYS10. Adam Marsnik and Deb Domek tested the procedure on the Aleph development server and it worked as expected, so the Task Force will now consult with the Cataloging User Group on how to proceed with the project.

Recap

2012
The Authorities Task Force met by conference call on July 10 and September 19. We focused on monitoring the implementation of RDA authorities, identifying potential problems with Aleph’s authority functionality, and plans to keep MnPALS libraries updated.

2011
The Cataloging Steering Committee discussed whether or not to disband the Authorities Task Force until there is more work to be done. Tina Gross (St. Cloud State) said, why not go on hiatus until spring. When RDA is implemented, there will be a lot of things to talk about, but for now their work is complete.

ERM Task Force – Dee Nolan

The ERM Task Force met via a web meeting on November 2014, and March 2015. Based on topics discussed at these meetings, several enhancements and fixes were added to the ERM.

- Resource Type field was added to the “Resources by Contract End Date” report.
- Removed note fields from the Subjects Tab of the ERM record making it easier to view and navigate.
MnPALS Indexing Task Force (MITF) – Alex Kent

The MnPALS Indexing Task Force has met and reviewed MARC changes and OCLC indexing changes.

We have determined that there are no new elements to add or any changes to make. Re-indexing will occur over the Thanksgiving break.

We discussed the normalization of the # character and concluded that the life expectancy of Aleph, the fact that it does not make records invisible, and that it is not a factor in MnPALS Plus coupled with the fact that we are uncertain of what table may or will really make the desired change, and concluded that it is best to leave the settings the way they are.

For full details please see the task force’s meeting notes in the forum: [https://www.mnpals.org/forum/index.php?board=23.0](https://www.mnpals.org/forum/index.php?board=23.0)

Report by Bobby Bothmann, MITF convener

Changes for Marc Bibliographic Format Update 21 were made on both production and development. These changes impact the validation error messages in Aleph Cataloging.

<table>
<thead>
<tr>
<th>Old line</th>
<th>Change to or Add new</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>AL XX 336 0 0 -</td>
<td>New subfield 0 in 336; add line</td>
<td></td>
</tr>
<tr>
<td>AL XX 337 0 0 -</td>
<td>New subfield 0 in 337; add line</td>
<td></td>
</tr>
<tr>
<td>AL XX 338 0 0 -</td>
<td>New subfield 0 in 338; add line</td>
<td></td>
</tr>
<tr>
<td>AL XX 348 -</td>
<td>New 348 field; add lines</td>
<td></td>
</tr>
<tr>
<td>AL XX 348 a 1 -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AL XX 348 b 0 -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AL XX 348 0 0 -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AL XX 348 2 0 1</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>AL XX 348 8 0 -</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Indexing Updates
For details on indexing, see Answer 3611. This will be updated again in January/February 2016, or if there are other major updates beforehand.
RDA Task Force – Alex Kent

**RDA Task Force**
At User Group 2014, the Cataloging User Group discussed whether to disband the RDA Task Force. No action was taken, but the User Group agreed to revisit the issue at User Group 2015. The Steering Committee subsequently consulted the “Task Forces Policy Document,” which states that a standing Task Force must decide when it has completed its charge, at which time the convener of that Task Force must provide written notification of cessation to the Group(s) which established it. No action is required by the Cataloging User Group. The Steering Committee contacted the chair of the RDA Task Force and requested that the RDA Task Force meet to review its charge. On October 5th 2015 the RDA Task Force voted to disband.

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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](mailto:mnpals-discuss@lists.mnpals.org)) or a posting on the PALS Forum ([https://www.mnpals.org/smfforum](https://www.mnpals.org/smfforum)).

Encourage others in your library to subscribe to mnpals mailing list, forum and wiki at [https://www.mnpals.org/content/new-library-staff](https://www.mnpals.org/content/new-library-staff)