

PALS UPDATE



Volume 2 / Issue 9

SCHEDULE

June:

9 (1:30 pm) – Meeting of the Minds

Topic: Share Alma/Primo data-clean up ideas ideas

14 – CLiC libraries freeze all activity in Alma, final copy begins

30 – Support Center switch to Zoho

July:

7 – CLiC live in MnPALS Alma/Primo environment

12 (2:30 pm) – ILL Community of Interest.

Topic: Let's talk about slips.

14 (1 :30 pm) – Meeting of the Minds

Watch the MnPALS Discuss list for Zoom or registration links.

Alma and Primo VE May 2021 release

Administration – The addition of a 'Save and Test' button gives users the ability to test authentication integration profiles (SAML, CAS, LDAP, and social log-in).

Resource Management – Alma can now limit changing holdings and relinking items based on the user role scope. The target library must be within the user role scope. Please open a support center ticket if you want the feature turned on.

Acquisitions – Ex Libris added 4th and 5th reporting codes to PO Lines, Invoice Lines, and Fund transaction screens. ([short video](#))

Resource Sharing – Locate statues are now available in the audit trail for borrowing and lending requests.

Fulfillment – Ex Libris added the ability to waive all fines and fees from a patron record. ([short video](#))

Analytics – New out-of-the-box Acquisitions and Fulfillment Dashboards are now available.

Primo VE – Ex Libris improved searching for hyphenated words.

[Alma Release Notes](#)

[Primo Release Notes](#)

From Johnna's Desk

Wow. How do I encompass everything that's happened over the last year (plus) and try to provide some context? I guess I'll just jump right in.

Since March 2020, you all have dealt with adapting to various levels of open hours in your physical and virtual libraries, accommodating changes in user needs, learning how to use new tools effectively, and communicating with colleagues in new ways. You've done this all while managing internal and external personal upheaval and crises during a global pandemic. It's pretty amazing (and exhausting) when you think about it!

The PALS Team has done a lot of work supporting you this year, too, so I'd like to share some of those projects. Dani Kroon has been leading our Alma/Primo VE Support Staff in our biggest project: the CLIC migration. That work has included holding several meetings with various library personnel to orient them to the MnPALS environment, get to know each of the institutions and what makes them unique, creating documentation, testing functionality, and meeting with the CLIC Migration Team on a regular basis since January.

We look forward to going live in July and settling in to ongoing support.

Other efforts we've started: helping our libraries adjust to the pandemic conditions, moving SubjectsPlus from St. Cloud State's servers to PALS, planning and participating in the MnPALS Virtual Conference, adding Minnesota State College - Southeast to Alma, API development and maintenance, upgrades to EZproxy, adding statistics to SubjectsPlus, migration to Islandora 8, migrating to a new support center software, and other various projects involving different segments of our membership.

I continue to be grateful to lead this team of 12 talented professionals in our work to assist you, and I appreciate your engagement in the consortium. I am excited to participate in our new governance structure and hope everyone finds a place there.

Announcement: Coming soon!

The PALS office will be switching over to a new customer relations management system (CRM) over the next three months. We are moving from Oracle Service Cloud to Zoho Desk. The anticipated go-live date with Zoho Desk is June 30, 2021.

The customer functionality will be very similar to the current system. Also, the PALS Office will gain better reporting capabilities and a nicer web interface. The PALS Support Team is excited about the switch!

Member Highlight, Jill Holman

PALS, Mankato Minnesota



Jill's current home-office companion, mostly called Rug Rat and Fluffball.

1. What is your current position, how long have you been in your position?

Systems Support and Training Librarian, since October 2019

2. What is your favorite function in Alma or Primo? Why?

I really like the data visualization capabilities that we got last November.

Now it is easier to make pretty charts.

<https://developers.exlibrisgroup.com/blog/?tag=oas>

3. What do you want to learn next?

My learning focus for the next couple of months is network zone analytics, and later this year, I look forward to The Elements of AI part 2 course.

<https://www.elementsofai.com/>

4. What are you currently reading or listening to?

Ink and Bone - the first book in a series where the Great Library of Alexandria is in charge, and they don't seem to be on the side of good.

5. What is your favorite snack?

I have to pick just one? Chocolate most often, but chips and salsa are really good too.

MnPALS and CLiC Migration Update

Ex Libris delivered the CLiC Migration Test environments during the first week in April. CLiC discovered several missing data elements during the testing process that Ex Libris will fix in the final copy. Also, the MnPALS Network Zone settings do not automatically populate the CLiC IZs. Ex Libris, PALS and CLiC, will perform the required settings changes before going live; this is especially true in the Resource Sharing area.

Ex Libris also provided a bibliographic multi-match report to us. There were about 8,000 bibliographic records from CLiC that had multiple matches in the MnPALS Network Zone. I was able to combine most of those records in the MnPALS production NZ. With the final migration, we should have fewer multi-matches.

We are learning from each other about all sorts of different possible workflows. I am always surprised that Alma and Primo allow for such diverse uses of the LMS. Once the dust settles from the migration, we are looking forward to helping CLiC libraries to adapt to new workflows and help MnPALS libraries expand and adjust current workflows. It will be a process requiring conversations, some trial and error, and adjustments. Most of all, it will take some time. Nevertheless, I am excited to see what our MnPALS Alma/Primo universe

will look like in one year. CLiC will no longer be CLiC but six individual institutions within the MnPALS Consortium.

St. Catherine, Bethel, Northwestern, Concordia, Hamline Universities, and the University of St. Thomas will go live in the MnPALS environment on July 7, 2021. Welcome!

Book a Consultation with PALS Support

Do you have Alma topics you would like to discuss? Perry, Etta, Carrie, and Dani offer consultation times to talk through workflow scenarios and use of the software to its full potential, functionality, or follow-up on a ticket.

Book a session:

[Perry](#) – Primo VE

[Etta](#) - Course Reserves or Fulfillment

[Carrie](#) - Acquisitions, Serials, and ERM

[Dani](#) - Resource Management

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[Alma/Primo Idea Exchange](#)