

PALS UPDATE



Volume 2 / Issue 6

SCHEDULE

February:

24 – 1:30 pm – Meeting of Minds
Third Iron Update

25 - 3 pm – Fulfillment Show &
Tell

March:

03 – 1:30 pm – Meeting of Minds
Governance Structure
Model A

04 – 2 pm – Resource Sharing
Show & Tell

08 – Registration for Virtual
Conference opens

10 – 1:30 pm – Meeting of Minds
Governance Structure
Model B

Watch the MnPALS Discuss list
for Zoom or registration links.

Alma and Primo VE March 2021 release

The March release is available on the Sandboxes now. It will be available on production on March 7, 2021.

New Metadata Editor – The new Metadata Editor (MDE) will be the default for all users. Click on Old Editor in the right-hand corner to switch back. With the June 2021 release, the new MDE will be the only choice. With the March 2021 release, rules management is available in the new MDE.

Acquisitions – We now have a new option to schedule PO packaging and EDI jobs multiple times per day.

Letters Configuration – Ex Libris added enhanced filter and search capabilities to find the desired letter quicker.

Analytics – The Combined Usage (last 12 months) field and the Usage by Title-Graph (shared->Alma->Usage->Reports) now use COUNTER 5 data.

Resource Sharing – Ex Libris resolved the Jasper error message when clicking on the Unassigned tab from a Fulfillment Lending request.

Primo VE – Resource Types improvements: The book resource type is applied books with accompanying audio or video discs. Dissertations now map to the Dissertation resource type.

[Alma Release Notes](#)

[Primo Release Notes](#)

In-Depth

CLiC Migration

The onboarding and migration of CLiC libraries to MnPALS officially began with the Ex Libris kickoff meeting on January 14, 2021. It

unofficially started last summer with Johnna and Dani meeting with the CLiC migration team. We talked about strategy, data clean-up, timing, and anything else random that came up migration-related.

During the fall, the PALS Support team answered questions from CLiC related to data and workflows. Additionally, each PALS Support team member conducted an overview webinar in every functional area to familiarize the six CLiC libraries with MnPALS's Alma/Primo set-up and workflow.

As a point of clarification, Ex Libris is not calling it a migration but rather a copy. Ex Libris will copy all data from the CLiC environment over to the MnPALS environment. Best of all, CLiC does not have to fill out any migration or P2E forms.

Upcoming:

Now the exciting part of this project happens, the creation of the test environment. On March 7, Ex Libris will copy data from the six CLiC libraries, the MnPALS NZ, Bemidji State University, and Minnesota State University, Mankato, into one test environment. While we have the test environment available, we will be testing to ensure that the six libraries can operate within the MnPALS consortium environment. Areas we will pay incredibly close attention to are Resource Sharing functionality and bibliographic record linking.

We will need to add Resource Sharing rotas to our configuration in the Network Zone to accommodate the CLiC libraries. Each CLiC library needs to figure out how they want to use Resource Sharing in the new environment, making workflow adjustments accordingly.

Bibliographic records coming from the CLiC libraries will copy to the MnPALS Network Zone. Contribution of the bibliographic records means that CLiC will inherit MnPALS bibliographic records, with matching based on OCLC number. CLiC libraries are currently working on moving their local data to Alma local fields to ensure minimal data loss.

Keys dates:

March 7 – Ex Libris pulls the data needed to create the test environment

March 17 – CLiC/MnPALS Alma test environment is available

March 17 – April 21 – Configuration updates and testing in CLiC/MnPALS Alma and Primo VE environments

April 28 – Completion of bibliographic record linking to the Network Zone in the test environment

The final data copy/migration will complete mid to late June 2021. The data test pull determines the exact go-live date in June.

Member Highlight, Nathan Rinne

Concordia University, St. Paul



1. What is your current position, how long have you been in your position? *I am the Metadata and Discovery Librarian at Concordia University. I have been at CSP for over ten years now.*
2. What is your favorite function in Alma or Primo? Why? *I like the subject browse lists because I am a nerd and deeply appreciate Library of Congress Subject Headings. As far as new stuff goes, I like the added functionality that Third Iron Projects like Browzine and LibKey Link provide.*
3. What do you want to learn next? *I'd like to become more familiar with basic JavaScript and AngularJS coding.*
4. What are you currently reading or listening to? *My First Exorcism: What the Devil Taught a Lutheran Pastor about Counter-cultural Spirituality by Harold Ristau ([here](#))*
5. What is your favorite snack? *Foldger's Chocolate Raspberry coffee, cold-brewed and iced, with sweetened condensed milk.*



Virtual Conference: Flexibility in Library Service: Rediscovering our Work (April 5 – 9, 2021)

Registration for the conference is coming in early March 2021. Be sure to watch the MnPALS Discuss list for registration information. You will have 20 sessions to choose from, ranging in topics from electronic resource management to copyright.



Meeting of the Minds

With a quick transition to working from home and all the professional and personal adjustments required, we all felt a bit overwhelmed. To give an outlet and share ideas, worries, and joys with colleagues, the PALS office facilitates a weekly meeting on Wednesdays at 1:30 pm. Over the last several weeks, we have seen a drop in participation. Please fill out a short survey about the future of the Meeting of the Minds, [Survey Link](#).

Primo VE 2021 Roadmap recording

Watch Ex Libris's webinar highlighting Primo VE improvements coming in 2021,

watch the [YouTube](#) video (34 min.)

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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