

PALS UPDATE



Volume 3 / Issue 6

SCHEDULE

March:

31 (1:00 pm) – RIPL (Reference and Instruction COI)

April:

01 (8:45 am – 2:30 pm) – Spring Gathering

07 (2:00 pm) – Discovery Community of Interest

13 (1:00 pm) – MnPALS Consortium Board meeting

13 (2:00 pm) – Meeting of the Minds (Topic: Clean-up and End-of-Year Reminders)

14 (10:00 am) – Cataloging Community of Interest

28 (1:00 pm) – RIPL (Reference & Instruction Discussion Group)

Watch the MnPALS Discuss list for Zoom or registration links.

Alma and Primo VE April 2022 Release Highlights

Acquisition – You now can search PO Lines by their internal note. See the [video](#) for more information. In addition, the terminology for one status changed from "Waiting for Renewal" to "Recurring Renewal."

ERM – Alma now has a process to update your electronic holdings for Wiley journals and books automatically.

Fulfillment – Add a reply to email address to library-specific letters. See the [video](#) for more information.

Primo – Coming from NERS the ability to expand a DB search by Database category name.

Resource Management – It is now possible to limit an item search to multiple libraries. Note that Alma remembers the selection. You will have to unselect the library facet. See the [video](#) for more information.

Resource Sharing – There are new configuration options to ignore electronic resources for physical requests. See [Configuring Parameters](#) for more information.

[Alma Release Notes](#)

[Primo Release Notes](#)

Alma Hidden Gems

We learned over the years that Alma offers many paths and shortcuts throughout the system. Alma is complex, intertwined, and click-heavy, for sure. However, Alma also provides workflows to minimize time spent on a

process. Here are some highlights. It is not a comprehensive list. Know that the PALS Support Staff is happy to assist with implementing any of the features listed below and others. Submit your questions via the [PALS Support Center](#).

Acquisition:

- ✚ You can import EOD files from a vendor using the New Order Import Profile. The vendor supplies a MARC file with bibliographic and acquisitions data. The import profile gives the option to upload the file or use the vendor's FTP site.
- ✚ Or send the orders the other way when you automatically export orders from Alma to vendors who use EDI (Electronic Data Interchange). For more information, see the [Ex Libris Documentation](#).

Resource Management:

- ✚ You can import bib records in batch from various sources and formats (MARC, XML, EXCEL, and delimited formats). For more information, see the [Ex Libris Documentation](#).
- ✚ You can use an Import Profile to load records from Institutional Repositories automatically. Set it up once and new and updated records will flow automatically from your Repository to Alma for display in Primo. For more information, see the [Ex Libris Documentation](#) and [PALS step-by-step instructions](#).
- ✚ If you have a vendor who provides records via an FTP server, you can set up an import profile to automatically connect to the FTP server to bring in records regularly. It starts by [configuring an Integration Profile](#).
- ✚ Do you want to highlight a collection in Primo? The process is not wholly automated. It does require updating the collection with new records. For more information, see the [PALS instructions](#).
- ✚ If you are tired of logging into OCLC to update your holdings, Alma can publish your new and deleted holdings to OCLC. For more information, see the [PALS instructions](#).

Electronic Resource Management:

- ✚ Use an Excel Spreadsheet to load local Portfolios. For more information, see the [Ex Libris Documentation](#).

Fulfillment:

- ✚ Do you have a message to go out to all of your patrons, you can notify all your active patrons. For more information, see the [PALS Instructions](#).
- ✚ You can also change checked-out items' due dates in bulk. For more information, see the [Ex Libris Instructions](#).

Member Highlight

Wail Kailani, Rochester Community and Technical College, Rochester

What is your current position, how long have you been in your position? *I was hired as an Information Technology Specialist 1 with the Goddard Library of Rochester Community and Technical College in May of 2005. Before that, I was a student worker at the library. I did my Computer Science internship at the same library as well. I have been with RCTC in one form or another (student or staff) since the fall semester of 1998.*



Share one thing you are excited about that is happening in your library? *I am excited about the events that the Compassion Corner in the library is holding throughout the semester, especially the pet therapy events and the chance to pet puppies and bunnies.*

What is a regular campus activity you missed last year? *Last year I missed helping students face to face and being in the library physically. I also missed my hallway walks and tracking my steps and floors count.*

What are you currently reading or listening to? *I am currently reading Breath by James Nestor. I have both the physical copy and the audiobook. The audible version comes in handy when following the breathing exercises mentioned in the book.*

What is your favorite snack? *My favorite snack is oatmeal or chocolate chip cookies, especially with my coffee.*

MnPALS Spring Gathering

On Friday, April 1, 2022, the MnPALS Consortium members will gather virtually. Governance discussions, Community of Interest, and Policy group meetings fill the day. You will also have the opportunity to meet the candidates for the Policy groups. The afternoon offers four concurrent sessions. For detailed information and Zoom links, please see the [Support Center \(login required\)](#).



NERS Enhancement Voting (First round)

Check out the 2022 Spring round of NERS Enhancement Voting. The NERS lists can be found [here](#). Two enhancement requests came from the Consortium of MnPALS members or PALS.

7810 submitted by Carmen Aslesen from the University of St. Thomas: *Make portfolio with POL Local when deleted from auto active electronic service.*

7954 submitted by Etta Thornburg, from the PALS office: *Expand Library specific customizations for Aggregated notices.*

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 discuss 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

Contact Us

PALS

Minnesota State University, Mankato

3022 Memorial Library

Mankato, MN 56001

Phone: 507.389.2000

Toll Free: 1.877.466.5465

daniela.kroon@mnsu.edu

carrie.curie@mnsu.edu, editor

www.mnpals.org

[Support Center](#)

[Ex Libris Knowledge Center](#)

[Alma Release Notes](#)

[Primo VE Release Notes](#)

[Alma/Primo Idea Exchange](#)