

PALS UPDATE



Volume 3 / Issue 1

SCHEDULE

September:

30 (1:00 pm): Reference & Instruction Community of Interest
Topic: Future planning

October:

01 (9 am – noon): OER Librarian Workdays. [Registration](#)

06 – 08: MLA, Virtual

13 (1:30 pm): Meeting of the Minds
Topic: Leganto

15 (9 am – noon): OER Librarian Workdays. [Registration](#)

Watch the MnPALS Discuss list for Zoom or registration links.

Alma and Primo VE Summer 2021 release highlights

Acquisition - It is now possible to set price and amount thresholds for PO Lines and invoices on the library level. Also, with the August release with SUSHI 5 accounts, you can define a specific time frame for harvesting data.

Analytics - Ex Libris added several new dashboards to Alma Analytics. In Alma, click on Analytics, see the new dashboards under the Reports column.

Fulfillment – You now can add the patron role and update the patron role’s expiration date at the circulation desk with a staff operator role.

General - Any Alma user may create sets and manage their own sets.

Primo VE – Received improvement in pagination and request forms.

Resource Sharing - Good news! ‘In Transit’ requests now can be converted to Resource Sharing requests.

Resource Management - The new Metadata Editor acquired numerous accessibility-related improvements this summer, such as color contrast, 200% zoom ability, and more space between text elements.

[Alma Release Notes](#)

[Primo Release Notes](#)

PALS Summer Update

The PALS Office had a summer full of projects: adding new Consortium members, collaborating with the governance structure transition team, bringing you a new PALS Support Center and redesigned PALS site, improving patron data loads to Alma, pulling IPEDS data, and presenting to our international Alma colleagues.

CLiC Migration

The CLiC Migration project is complete!

We welcome these six institutions from the former CLiC Consortium to the MnPALS consortium and the Alma/Primo environment:

-  Bethel University
-  Concordia University (St. Paul)
-  Hamline University
-  Northwestern University
-  St. Catherine's University
-  University of St. Thomas

The data migration went relatively smoothly. As with any migration, there were a couple of hiccups along the way. The six libraries went live in the MnPALS environment on July 7, 2021. This type of migration where one consortium joined another consortium was the first for Ex Libris. We all learned a lot during the process. The CLiC libraries, with Sonja's help, worked especially hard on setting resource sharing in the new environment. The six libraries contributed 410,660 unique bibliographic records to the Network Zone, an increase of 8.5%.

New Governance Model

The DDC (Deans, Directors, and Coordinators) voted to adopt the new governance structure, the Consortium Board model, during the April meeting. See the [PALS forum](#) for a detailed explanation of the board structure. During the summer, the governance transition team worked on language to make the new model operational. The consortium board model allows for interest groups. Anyone can put out a call for members for an interest group. If you want to discuss a topic with like-minded librarians, put out a call on the MnPALS Discuss list. Members of the consortium already formed two interest groups: Reference & Instruction; and Interlibrary Loan. The Consortium Board met for the first time on September 16, 2021. Watch for meeting notes from Johnna on the MnPALS discuss list.

New Ticketing System

After many months of contract issues, the PALS office finally signed a contract with Zoho for our new Customer Relations Management system. If you have not already done so already, please [create a user account](#). Please use Zoho for entering tickets; we are not actively monitoring the old support center. The transition is going well. We all are learning Zoho as we use it. Currently, the PALS support staff is working on populating the knowledge base with training and instruction documentation. Our ultimate goal is to have most of our documentation in the Zoho Knowledge Base by the end of December 2021. In the meantime, all of our documentation is available from the [PALS website](#).

Redesigned PALS webpage

The PALS webpage has a new look. The new look and feel came about due to the need to update plugins and themes. Along with the update, you will notice improvements in searching, accessibility, and speed. Check it out at www.mnpals.org.

MinnState User Loads

Etta worked tirelessly with the development team at MinnState to update the code for user loads to Alma from ISRS. After many meetings, trial runs, and some snags along the way, the new code is now active in the Alma production environment. The user load now includes additional information such as StarID, User Groups (graduate, undergraduate, faculty, or staff), statistical data, registration block, and user info (distance student, expected graduation term, non-degree seeking).

Network Zone IPEDS

We are activating more and more resources via the Network Zone. Jill spent the latter part of June pulling IPEDS data from the Network Zone for affected libraries. She shared the reports with each institution.

Presentations

Carrie and Dani presented twice this summer. One presentation was for the Novanet Consortium in Nova Scotia, Canada. Novanet is migrating from Aleph to Alma in 2022. We shared our experience migrating specific to cataloging and ERM workflows.

They also presented at IGeLU on August 26, 2021 ([Presentation Day 3](#)). Their presentation was “Optimizing Data in Alma/Primo for the Minnesota State Equity 2030 Initiative.” After Dani gave an overview of the Equity 2030 initiative, Carrie dived into data clean-up, ensuring links work and minimizing dead links to electronic resources in Primo to ensure a consistent experience for all.

Member Highlight

Ed Warga, St. Cloud State University, St. Cloud



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

Library Systems and Discovery Specialist. I have been at St. Cloud State University Library for almost one year.

2. Share one thing you are excited about that is happening in your library?

I am involved in several projects to increase the usability of our online tools. I'm excited to help make these tools more useful for our patrons. Right now, I am working on a project to refresh our Primo instance. I will start working on a library website refresh soon.

3. What is a regular campus activity you missed last year?

I was hired during COVID-19 when the campus was shut down, and I continue to work remotely. I haven't even visited the St. Cloud State campus yet, so I don't know what I'm missing. I hope to visit in the future and see what campus is like at St. Cloud State.

4. What are you currently reading or listening to?

I recently found that there are several audiobooks on the Spotify platform. I've been catching up on some classics like H.P. Lovecraft's wacky horror stories.

5. What is your favorite snack?

I really like pretzels.

Training Opportunities



[ELUNA Learns](#) events continue through December 2021, past events are available for on demand viewing. Each block of session costs \$25.00



This year's IGeLU conference presentations are now available for free, [here](#).

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

Contact Us

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[Ex Libris Knowledge Center](#)

[Alma Release Notes](#)

[Primo VE Release Notes](#)

[Alma/Primo Idea Exchange](#)