

PALS UPDATE



Volume 2 / Issue 8

SCHEDULE

March:

24 (1:30 pm): Meeting of Minds
Topic: New Governance Models

25 (1 pm): Reference & Instruction
Community of Interest
Topic: Assessment

April:

5 – 9: MnPALS Virtual Conference

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

Watch the MnPALS Discuss list
for Zoom or registration links.

Alma and Primo VE April 2021 release

April 2021's release is an infrastructure release. Ex Libris generally uses one or two release cycles per year for maintenance and cloud infrastructure updates.

Potential NA04 move - Ex Libris may need to move several Alma/Primo environments to a different data center. Our MnPALS environment (NA04) is on the list. The data move, if required, will happen during Memorial Day weekend.

Cloud Apps – Ex Libris is rolling out Cloud Apps. Cloud Apps are nifty programs utilizing API development. Several of the apps are available via the Alma interface. **For MinnState folks**, enabling Cloud Apps includes a click-through agreeing to the terms and conditions. The terms are under review by MinnState's legal office. MinnState users, please hold off using Cloud Apps until the review is complete. **For non-MinnState Institutions**, please follow your legal office guidelines.

[Alma Release Notes](#)

[Primo Release Notes](#)

In-Depth

The Lifecycle of a Support Center Ticket

Have you ever wondered, once you opened a Support Center ticket with the PALS office, what happens next? The ticket gets assigned to the best support team member to answer your question. We know that functional areas within Alma and Primo are intertwined. One question potentially touches another area within the software. Sometimes we pass one ticket from the initial support staff member to another staff member several times before we provide an answer to you.

How we can use the ticket

- The PALS Support team uses the ticket to communicate within the PALS office.
- We use the ticket to communicate with the submitter to ask follow-up questions or suggest booking a [1:1 session](#) with us. Sometimes a ten-minute conversation solves a problem quicker than multiple messages.
- If PALS Support passes the ticket along to Ex Libris, we update the PALS ticket with the Ex Libris case number.

Fall 2020 Ticket Review

During the 2020 Fall semester (September 1, 2020 – December 1, 2020), the PALS office received 887 Alma/Primo-related tickets. One of the busiest areas, not surprising, is Electronic Resource Management-related tickets, with 400+ tickets opened in the three months. Other functional areas follow:

Primo VE (Discovery, Analytics, CDI, Other) – 110

Fulfillment – 94

Acquisitions/Serials – 93

Resource Sharing – 76

Resource Management – 63

Analytics – 8

Other - 8

Booking – 3

We also received 400+ tickets that fall into the following categories: SubjectsPlus, EZproxy, and IPEDs.

During the same period, the PALS office opened 114 tickets with Ex Libris, which means 12% of PALS tickets went to Ex Libris. Seventy-two of the Ex Libris tickets fall into the data service and CDI categories. When finding metadata problems with vendor-provided, Alma or CDI records, we pass those along to Ex Libris right away. Fixing Alma CZ/CDI metadata is out of our realm of influence and needs to be addressed by Ex Libris.

Primo Indexing Issues Tickets

To update you on a long-standing issue: Ex Libris continues to address Primo's on-going indexing problems. It is a complicated issue to track down and fix due to the randomness of the problem.

Need Help?

Keep those questions coming! We like hearing from all of you, and the PALS support team is always available to help. Please, do not spend hours figuring out a problem or new workflow when we are here for you.

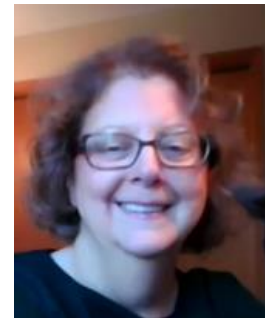
Announcement: Coming soon!

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. On the backend, the PALS Office will gain better reporting capabilities and a nicer web interface. The PALS Support Team is excited about the switch!

Member Highlight, Sheila Hatchell

Minnesota Department of Transportation Library, St. Paul



1. What is your current position, how long have you been in your position? Library Director at the Minnesota Department of Transportation (MnDOT) Library. I'm in my 13th year in that position.
 2. What is your favorite function in Alma or Primo? Why?
For many reasons, I really like the fact that both Alma and Primo are web-based. I also like Primo's federated searching capabilities, which has expanded our catalog to other resources that are often quite useful/helpful.
 3. What do you want to learn next?
We are planning an installation of Islandora this spring and are very excited about that. We looked at Islandora in the past, and this time we were able to pull the funding and support together to make it actionable. In addition to providing a permanent home for digital publications, we have many historical publications that we are anxious to scan and make available through the forthcoming MnDOT Digital Library.
 4. What are you currently reading or listening to?
Lately, I have been doing more 'watching' and recently enjoyed All Creatures Great and Small on PBS. It is joyful entertainment and a nice diversion from everything we have been through the past year.
 5. What is your favorite snack?
I like to snack on fruit and nuts. But my guilty pleasure is double-dipped chocolate-covered peanuts!
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Virtual Conference: Flexibility in Library Service: Rediscovering our Work (April 5 – 9, 2021)

[Registration closes on April 2. Register here.](#)

MnPALS and CLiC migration update

Ex Libris pulled the data from the six CLiC libraries, the MnPALS Network Zone, and two MnPALS institutions Zones (Bemidji State and Minnesota State University, Mankato) to create the test environment. Currently, Ex Libris is working on linking CLiC bibliographic records to the Test Network Zone. It will be interesting to see how many new bibliographic records CLiC adds to the MnPALS consortium.

We will work on testing Resource Sharing functionality and sharing vendor records via the Network Zone in the upcoming weeks. Also, we will be counting records to ensure everything from the CLiC environment copies over.



The ELUNA Annual Meeting, 2021 will be virtual again. Kepp an eye out for registration and sessions, [here](#).

Book a Consultation with PALS Support

Do you have Alma topics you would like to discuss? Perry, Etta, Carrie, and Dani offer self-booked consultation times to talk through workflow scenarios and ways to use 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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