

# PALS UPDATE



Volume 3 / Issue 4

## SCHEDULE

January:

27 (1:00 pm) – [RIPL \(Reference & Instruction Discussion Group\)](#)

February:

03 (2:00 pm) – [Discovery Community of Interest](#)

06 – Alma/Primo Production Release

09 (2:00 pm) – [Meeting of the Minds](#)

13 -- Reminder Sandbox Refresh

24 (1:00 pm) – [RIPL \(Reference & Instruction Discussion Group\)](#)

Watch the MnPALS Discuss list for Zoom or registration links.

## Alma and Primo VE January/February 2022 Release Highlights

**Analytics** – With the February release, users can define data visualization projects as objects.

**Course Reserves** – Using the withdraw item action now checks for Course Reserve materials.

**Resource Management** – Coming in February, users will gain the ability to export NZ-linked bibliographic records from the IZ.

**Resource Sharing** – With another February feature, the ability to use Job Category as an input parameter for the resource sharing borrowing Terms of Use.

**User Management** – When exporting a list of users, select the Extended Export option to export primary identifiers.

[Alma Release Notes](#)

[Primo Release Notes](#)


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### *From Carrie's Desk*

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## ERM SPRING CLEANING

*With Spring around the corner, "Spring Cleaning" time quickly approaches. Like everything else, there are some things you can do in Alma to improve your patrons' ER experience in Primo. Here are five key cleanup projects.*

 Let PALS manage your eLM or recommended OA electronic collections from the NZ. If you have not switched yet, Dani will be contacting you regarding moving those collections.

 Review your electronic collections in the IZ. Ensure you have your current subscriptions correctly activated – and deactivate or delete any electronic collections you dropped. If you would like to work with PALS

staff to get started, book either of the following sessions at the [Carrie Curie – PALS Booking page](#):

*ERM: One-on-One Institutional Collection Activation Review Session (web session) – 1 hour 30 minutes or  
ERM: One-on-One Institutional Collection Activation Review Session (web session) – 45 minutes.*

- ✚ Review your standalone portfolios in Alma. *If you have the titles activated in a CZ-linked collection, you no longer need the standalone portfolio.*
- ✚ Check your portfolio counts for selective package electronic collections. You want to ensure you activate all individual titles you purchased.
- ✚ Bibliographic records without inventory display in Primo unless suppressed. Delete bibliographic records without inventory. Also, the link resolver can experience problems when you have an inventory-less bibliographic record and one with a portfolio. Delete inventory-less bibliographic records to guarantee that your users see the link to the resource.

There are also several other cleanup projects you can embark on in Alma with electronic resources. These five cleanup projects have a high impact, improving your users' discovery and access experience in Primo. Keep in mind that once you get some of these projects tackled, you might want to turn on extra functionality in Primo, like:

- Report a Broken Link
- UnPaywall QuickLinks – one-click to OA full-text access
- QuickLinks – one-click to full-text access

As always, if you encounter linking issues or other ERM issues, submit a [PALS Support Center](#) ticket.

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## Member Highlight

**Diane Groen Sharits, Minnesota State University, Mankato**

### **What is your current position, how long have you been in your position?**

*Library Cataloging Tech in Technical Services. I started at MSU, Mankato, on October 24, 1990. I am in my 32<sup>nd</sup> year.*

### **Share one thing you are excited about that is happening in your library?**

*I am excited to be involved in relocating the Music Library collection from the Performing Arts building to the main Memorial Library building on the first floor at the end of Spring semester 2022.*



### **What is a regular campus activity you missed last year?**

*I miss the potlucks that we used to do in Spring and Fall to show appreciation for our student workers.*

### **What are you currently reading or listening to?**

*I listen to any and all country music.*

### **What is your favorite snack?**

*Buttered popcorn.*



## *Sandbox Refresh*

The Alma/Primo Sandboxes will refresh with new data on February 13, 2022. Please write down settings and configurations associated with the current projects you are working on in the Sandbox. After the refresh, you will need to re-create your experiments' settings and configurations on the Sandbox. A reminder that the

Sandboxes refresh twice per year in February and August.

## *In other Ex Libris news*

Ex Libris is adjusting their Alma/Primo release schedule.

- New features will appear in Alma/Primo quarterly, starting with August.
- Software bug fixes will continue to be released every month.
- The new features will continue to be available on the Sandboxes two weeks before the production release.

Other products, such as Leganto, Rapido, Esploro, and Rialto, will continue on a monthly release schedule.

If you want to learn more, join Ex Libris's webinar on January 31 at 9 am; [registration](#).

## *Ex Libris Trainings*

If you missed an Ex Libris webinar in 2021, the recordings are accessible on-demand. Check back periodically to catch upcoming events, <https://exlibrisgroup.com/webinars-explore-learn/>

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### **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

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## Contact Us

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[Ex Libris Knowledge Center](#)

[Alma Release Notes](#)

[Primo VE Release Notes](#)

[Alma/Primo Idea Exchange](#)