

CSU TS Monthly Release Testing Group

13th Meeting, May 11, 2021 from 11 AM - 12 PM PST

Attendees: Pam Anan, Heather Cribbs, Jessica Hartwigsen, Hannah Lee, Luiz Mendes, Kim Valenzuela

Apologies: None

Location: Zoom

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Agenda:

I. Announcements

- Membership
 - Recruit after ULMS nominations are completed and after new fiscal year starts

II. Testing Results and Feedback

- February 2021 - May 2021 Releases
 - https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2021/Alma_2021_Release_Notes
 - Old MDE to sunset in October 2021
 - Accessibility improvements
 - 'Suppress from Discovery' is Available for Unsaved Records
 - Chat with Support
 - Easier than filing Salesforce ticket, fairly responsive, more expedient way to ask for help
 - So far, asked about resource sharing issue, display logic issues asked
 - Is it a replacement for Salesforce? It makes a case automatically
 - Before filing a case: Double check browsers first, then check internet connection, then ask a colleague (is it me or campus-wide), then ask Slack and ask Salesforce
 - Check if it's on user end or Ex Libris's end
 - Are general guidelines required for the campuses before enabling chat?
 - It depends on the level of the case

- Certain people have access to Salesforce; can use chat and it has to be turned on for these individual
 - Consult Alma/Primo contact or systems support on campus to see what the current local guidelines for opening a case with Salesforce are; defer to local procedures with filing a case
- Information Loss Prevented when Changing Item Location by Moving the Last Item to a New Holdings
- New Option To Replace Resource Associated With An Electronic PO Line
 - How much activity? Or anything new? Or issues with swapping?
 - If this works, it means POLs need to be moved to the new resource
- 4th and 5th reporting codes added to acquisitions entities
- Heading Information in Metadata Editor and Repository Search
- Opening New Holdings from the Add Inventory Menu
 - How often or easy is it to get back where you started?
 - Test this out for more functionality
- Overlap analysis update
 - Helpful to Jessica, but not all the campuses individually
 - If someone needs it, then Jessica can run it against just that library
 - Can't run IZ against NZ
- Action Item:
 - Present at another TS Open Forum with new updates for the 1st and 2nd quarter?
 - Potential date: June 17, 2021

III. Goals for FY 2021-2022

- Primo Release Testing? Primo VE?
 - Collaborating with other groups (Discovery, etc.)
- CDI Testing
 - February 2021 - Inheriting or not?
 - Still being worked out by Ex Libris
 - Jessica still checks on any changes and asks for clarification
 - ERM as the go-to group for CDI issues
 - Point out new features to the ERM FC
- GuideMe?
 - How to test?
 - Link to all GuideMes and FAQ:
 - [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/010Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/GuideMe_Frequently_Asked_Questions_\(FAQ\)](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/010Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/GuideMe_Frequently_Asked_Questions_(FAQ))
 - Just documentation as an option instead of an actual live walkthrough?

- Report back about issues/feedback on status of enhancements; report any new problems from new enhancements if any exist

V. New Items

- Doodle poll for next meeting in the 3rd quarter 2021