

## PALS Work Plan

Task Number	Task Name	Functional Area	Who benefits?	Priority	Notes
1	Review and reset priorities for outstanding Aleph problems	Operations/Support	consortium	1A	
2	Keep current on security patches	Operations/Support	consortium	1A	
3	Proxy server support	Operations/Support	libraries purchasing service	1A	
4	Monitor server logs	Operations/Support	consortium	1A	
5	System files and data backups	Operations/Support	consortium	1A	
6	Administrative activities (budget, personnel, planning)	Operations/Support	consortium	1A	
7	Communication with libraries	Customer Relations	consortium	1A	
8	Project management	Operations/Support	consortium	1A	
9	Build Aleph answerbook	Operations/Support	consortium	1A	
10	Support wikis and forums	Operations/Support	consortium	1A	
11	Support Gateway for member libraries	Operations/Support	consortium	1A	
12	Submit SI's to Ex Libris regarding Aleph problems	Operations/Support	consortium	1A	
13	Consultations with Libraries as needed	Customer Relations	library	1A	
14	RightNow support and training	Operations/Support	online learning	1A	
15	Provide answers to Aleph support calls	Operations/Support	consortium	1A	
16	Aleph server configuration	Operations/Support	consortium	1A	
17	Install Aleph service packs	Operations/Support	consortium	1B	
18	Load authority record updates	Operations/Support	consortium	1B	
19	Review SI's and notify Ex Libris of urgent issues	Operations/Support	consortium	1B	
20	Reports maintenance	Operations/Support	consortium	1C	
21	Negotiate maintenance agreement with Ex Libris	Administrative	consortium	1C	Most recent negotiations session was held 9/19/07.
22	Provide training and workshops for libraries	Operations/Support	consortium	1C	
23	Work with Cataloging Steering committee on Aleph Cataloging issues.	Cataloging	consortium	1C	
24	Provide & track information with Task Forces	Operations/Support	consortium	1C	
25	Global changes as requested	Operations/Support	library having change done	1D	
26	Ongoing Web OPAC tweaks as requested by libraries	Reference	consortium	1D	

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27	Test cash transaction financial interface with MnSCU business office	SYSTEMS, CIRC	MnSCU libraries; others if local business office can handle format	2A	In progress. Fall 2007 Circ User Group requested that workaround be investigated to handle credits.
28	Version 18 Upgrade	Operations/Support	consortium	2A	Goal for completion: early 2008
29	Oracle 10G Upgrade	Operations/Support	consortium	2A	
30	Version 18 planning	Upgrade	consortium	2A	
31	Test ISO ILL between Aleph and OCLC	ILL	consortium	2A	We have done an initial round of testing with OCLC and have reported specific problems to ExLibris; discussions with Ex Libris are ongoing.
32	Version 18 server setup and preparation	Upgrade	consortium	2A	
33	Setup and configure new Aleph test server	Upgrade	consortium	2A	
34	Investigate value-added services (i.e. SFX and MetaLib)	Administrative, SYSTEMS	consortium	2A	Initial contact made to get price quote; part of strategic planning
35	Develop communications plan		consortium	2A	Team formed to create plan
36	Prepare for and conduct version 18 training	upgrade	consortium	2A	
37	Create VISTA GUI client for version 17	SYSTEMS	consortium	2A	
38	Electronic link	WebOPAC	consortium	2A	#1 of top five issues. (#17) Preceding/succeeding entry links are not direct. (#8) Related problem: why can't the URL be a link to that item rather than just text. (#57) When a succeeding title is entered in the 785 with the corporate body in subfield a a
39	Prepare for and conduct Integrated ILL training	Training, ILL	ILL	2A	
40	Write functional training/documentation for version 18	Support	consortium	2A	
41	Investigate and Test then Load holdings back to OCLC(serials update)	CAT,SYSTEMS	consortium	2A	In progress
42	Create Z106 populated with CAT fields that are removed from bib records (5 will be retained).	CAT	Cataloging staff	2A	From Fall 2007 Cataloging User Group meeting.
43	Implement new patron interface using Lucene (open source product)	Development	Reference	2B	
44	Integrated ILL conversion	Upgrade	ILL	2B	
45	Test interface with GOBI (YBP collection manager)	ACQ	ACQ	2B	In progress
46	Investigate Aleph reports alternatives	Reports	consortium	2B	Report group active
47	Test reports in version 18	Upgrade	consortim	2B	

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48	Configure and test Aleph Reporting Center	ACQ/SER,CAT,CIRC,ILL,OPAC,SYSTEMS	consortium	2B	Some testing has been done; requested licenses from Ex Libris; formed group to look at reporting needs and evaluate ARC; ARC 2.0 will be installed later this fall; Ex Libris recommends purchasing additional processors.
49	ARC server setup and preparation	Operations/Support	consortium	2B	
50	Merge mailing lists	Operations/Support	consortium	2B	
51	User Group preparation	Operations/Support	consortium	2B	Set for 10/11/07
52	Availability status on individual record page, less confusing Owned Out, better wording	WebOPAC	consortium	2B	#3 of top five issues - Completed
53	Check if new patron can have their initial password set to their last name.	CIRC	CIRC	2B	Requested by CIRC User Group, Fall, 2007.
54	Re-index Aleph database	Operations/Support	consortium	2C	Set for 11/21/07
55	Email order lists to vendors	ACQ	some libraries	2C	
56	Resolve MARCIVE issues	Operations/Support	MARCIVE libraries	2C	
57	Oracle training for tech staff		consortium	2C	Oracle CD's purchased; tech staff pursuing as time permits
58	Site visits to libraries	Customer Relations	consortium	2C	One visit completed, schedule being developed.
59	Test EDI with Book House for book orders	ACQ, SYSTEMS	a few	2C	
60	Implement discovery tool components	Development	Reference	2D	
61	Load records such as NetLibrary as required	Operations/Support	some libraries	2D	
62	Revise Aleph Reporting Center documentation	ACQ/SER,CAT,CIRC,ILL,OPAC,SYSTEMS	consortium	2D	
63	Conduct training for Aleph Reporting Center for libraries	SYSTEMS	consortium	2D	All ARC training web-based
64	Create list of reports with descriptions	ALL	consortium	2D	
65	Investigate holds by title	OPAC, Circ	consortium	2D	Will be deleted - refers to PDQ, alternate to ILL.
66	Saving search aka Search Persistence	WebOPAC	consortium	2E	#4 of top five issues - resolved in version 18?
67	Color Scheme	WebOPAC	consortium	2E	#5 of top five issues
68	Test delete functionality of p_cir_77 (patron architecture issue)	Operations/Support	Systems staff libraries using	3A	Not going to be resolved in v. 17. Will test in version 18.
69	Test EDI with EBSCO for serials claims	ACQ/SER,SYSTEMS	serials	3A	
70	Test ISO ILL between ALEPH and VDX	ILL	consortium	3A	we have exchanged testing setup information but ran into a problem. OCLC-PICA VDX needs to have the symbol in upper case and our ILL symbols are lower and upper case

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71	Install and configure EZProxy	Operations/Support	libraries purchasing service	3A	License acquired.
72	Prepare booking training for libraries	Development	libraries using Booking	3A	
73	Conduct booking training for libraries	Development	libraries using Booking	3A	
74	Implement Booking	Upgrade	consortium	3A	
75	Version 17: Test batch service for Delete Item Records (item-11)	Upgrade	consortium	3A	
76	Version 17: Implement new SDI feature	Upgrade	consortium	3A	Include with version 18 training?
77	Test/Implement EDI book claiming	ACQ	some libraries	3B	
78	Test EDI Order Acknowledgments (B&T first)	ACQ	some libraries	3B	
79	Purchase and load new authority file	Operations/Support	consortium	3B	After move to v. 18
80	Implement new v.18 authorities functionality	CAT	consortium	3B	After move to v. 18
81	Version 18: Test authority file processing	CAT, SYSTEMS	consortium	3B	This will include further testing on the deblinding feature for topical headings and names & geographic headings and automatic update of headings; after upgrade to version 18
82	Determine additional training needs for libraries	Customer Relations	consortium	3B	
83	Centralize customization and maintenance of XSL forms	Systems	Systems staff	3B	Requested by consortium as part of strategic planning.
84	Implement Binding	SER	5-6 libraries	3C	
85	Report: BIBs without Titles (mnpals-39)	Reports	consortium	3C	on lute for testing
86	Report: All searches for Your Library (mnpals-42) & Most Popular Searches (mnpals-43)	Reports	consortium	3C	on lute for testing
87	Report: ILL Unit Code (mnpals-40)	Reports	consortium	3C	on lute for testing
88	Report: Blocked Patrons (mnpals-31)	Reports	consortium	3C	on lute for testing
89	Report: Patrons owe money (mnpals-34)	Reports	consortium	3C	on lute for testing
90	Report: ISSUE Titles Circulated (mnpals-35)	Reports	consortium	3C	on lute for testing
91	Report: Browse-Use ISSUE Titles(mnpals-36)	Reports	consortium	3C	on lute for testing
92	Report: Patron Records with Fines - old PALS report CIRC-055/New = Patrons owe money (mnpals-34)	Reports	consortium	3C	on lute for testing
93	Develop online training for forum and wiki	Operations/Support	consortium	3C	
94	Report: LOST Titles (mnpals-41)	Reports	consortium	3D	in progress
95	Report: Cir-30 Statistics: Choose the sub-library(ies) for which the statistical report will be generated.	Reports	consortium	3D	In progress
96	ADM level change; tab31 changes executed through service to update existing patron privileges	CIRC, SYSTEMS	all libraries	4A	Ask Susan to explain

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97	Report: Patron Bills (old PALS CIRC-073).	Reports	consortium	4A	Luda is investigating
98	Add STAtus field so 'suppressed' can be used in course reserves (like Web OPAC)	Course Reserves	many libraries	4B	
99	Test EDI with Ambassador	ACQ, SYSTEMS	libraries using ACQ	4B	
100	Report: CIR-05: Add alternate field choices to report setup	CIRC, SYSTEMS	CIRC	4B	
101	Identify, then change, patron deletes needed for old expirations (global change?)	CIRC, SYSTEMS	all libraries	4C	SI 8192-49844, SI 8192--47401 have been escalated to highest priority
102	Test EDI with Emery Pratt	ACQ	a few libraries	4C	
103	Report: Request to add a new service for all libraries in the GUI client that will create a report for titles that have open (unexpired) subscription records.	Serials & Cataloging	libraries using serials	4C	Refer to Clientele ticket number 27493 for detail. one-time new batch service
104	Add link to PALS Support Center in Aleph client	Operations/Support	consortium	4C	
105	Write documentation about ISO ILL functionality and Conduct workshops about ISO ILL functionality	ILL	ILL staff; maybe reference staff	4C	Perhaps a break out session at UG
106	open_window javascript function needs to be rewritten	WebOPAC	libraries with Netlibrary records	4D	Problem description: When Netlibrary records come up and the link is clicked on, they pop up in a new window, but that new window does not have an Internet Explorer toolbar. It has been determined that the solution is to eliminate the pop-up window.
107	Report: Circ-05 Patron List (empty tech id's)	CIRC, SYSTEMS	consortium	4D	To discuss with reports group
108	SDI Webinar or Tutorial	OPAC, Planning, Training	consortium	4D	Improved SDI available with version 17
109	Global change to remove 'x' in 852 subfield h in holdings records	CAT	libraries using 'x' suppression	4E	Affects about 100,000 records
110	Report: similar report to New Titles mnpals-14 for all state government libraries	Reports	consortium	4E	
111	Investigate the implementation of hold types (serial/parallel) in the web OPAC.	OPAC	consortium	4E	Functionality will be available in version 18.
112	Investigate LDAP authentication for GUI staff users	Upgrade	some libraries	5A	
113	Ask EL for tools(s) to correct CCL abbreviations in GUI OPAC client	Client	consortium	5A	need RoboHelp or similar product
114	Investigate Aleph Digital Asset Module (ADAM)	Upgrade	consortium	5A	
115	Work on Web OPAC help screens--need input from libraries	OPAC	consortium	5A	MnPALS Access Group input needed; samples from MHS; volunteer from SMU to help
116	Version 19: OPAC Course Reserves modifications	OPAC, COURSE RESERVES, SYSTEMS	libraries using CR	5B	Ex Libris development for Version 19
117	Investigate Aleph PDS (Patron Directory Service for user authentication)	Upgrade	consortium	5B	
118	Add configuration to e-mail failed IPIG requests from Zportal to Aleph ILL staff email address	ILL	ILL staff	5C	need workaround
119	Investigate use of Banner interface	ACQ	ACQ	5C	

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120	Help on Field Tag Information added for OCLC fields (new file available in version 17)	CAT	Cataloging staff	5C	Requires software and someone to do it; Cat users group needs to identify wording; in progress with Validation work group and will be reported to cat group; may be version 17