

PALS Library Services Work Plan

4/4/2008

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	Maintain ISO interoperability with external servers	Operations/Support	consortium	1A	
13	Submit SI's to Ex Libris regarding Aleph problems	Operations/Support	consortium	1A	
14	Consultations with Libraries as needed	Customer Relations	library	1A	
15	Provide answers to Aleph support calls	Operations/Support	consortium	1A	
16	Aleph server configuration	Operations/Support	consortium	1A	
17	Maintain links to external data sources (e.g. patron files, financial data)	Operations/Support	consortium	1B	

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18	Install Aleph service packs	Operations/Support	consortium	1B	
19	Load authority record updates	Operations/Support	consortium	1B	
20	Review SI's and notify Ex Libris of urgent issues	Operations/Support	consortium	1B	
21	Reports maintenance	Operations/Support	consortium	1C	
22	Negotiate maintenance agreement with Ex Libris	Administrative	consortium	1C	Most recent negotiations session was held 9/19/07. Proposal provided; response requested.
23	Provide training, documentation, and workshops for libraries	Operations/Support	consortium	1C	
24	Provide support to User Groups, Steering Committees, and Task Forces	Operations/Support	consortium	1C	
25	Customize and maintain XSL forms	Operations/Support	Systems staff	1C	Requested by consortium as part of strategic planning. Moved to operations.
26	Global changes as requested	Operations/Support	library having change done	1C	
27	Ongoing Web OPAC tweaks as requested by libraries	Reference	consortium	1C	
28	Create new reports as needed	Reports	consortium	1C	
29	Implement new patron interface using Solr and Lucene (open source products)	Discovery	Reference	2A	In progress.
30	Version 18 Upgrade	Operations/Support	consortium	2A	Goal for completion: June 2008
31	Integrated ILL conversion	Upgrade	ILL	2A	In progress.
32	Test EDI with Book House for book orders	ACQ, SYSTEMS	a few	2A	In progress

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33	Version 18 planning	Upgrade	consortium	2A	
34	Investigate Open URL Link Resolver	Discovery	Reference	2A	
35	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.
36	Implement ISO ILL between Aleph and OCLC	ILL	consortium	2A	
37	Implement EZProxy	Operations/Support	libraries purchasing service	2A	One library in production. In the process of converting two libraries from libproxy.
38	Investigate value-added services (i.e. SFX and MetaLib)	Administrative, SYSTEMS	consortium	2A	Initial contact made to get price quote; part of strategic planning
39	Develop communications plan	Customer Relations	consortium	2A	
40	Electronic link	WebOPAC	consortium	2A	Preceding/succeeding entry links are not direct. (#57) When a succeeding title is entered in the 785 with the corporate body in subfield a and "Annual report" in subfield t, clicking on the link does not take you to the record for the succeeding title. (#58) When a succeeding title is the name of a corporate body with a bracketed subtitle supplied by the cataloger, the bracketed subtitle is not included in the 785 field. (#17) Ref User Group recommends MARC 76x-78x fields not be linked as they are not access points.
41	Prepare for and conduct Integrated ILL training	Training, ILL	ILL	2A	Scheduled for April and May, 2008
42	Write functional training/documentation for version 18	Support	consortium	2A	In progress

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43	Prepare booking training for libraries	Development	libraries using Booking	2A	In progress
44	ADM level change; add service to replicate tab31 (privilege) changes in existing Z305 patron privilege records associated with that ADM	CIRC, SYSTEMS	all libraries	2A	
45	Delete subfield 3 from 856 field in netLibrary records	OPAC	consortium	2A	
46	Check if new patron can have their initial password set to their last name.	CIRC	CIRC	2B	Requested by CIRC User Group, Fall, 2007. Not currently possible, requested fix from Ex Libris.
47	Test functionality of p_cir_77 (patron architecture issue)	Operations/Support	Systems staff	2B	Tested in version 18 - can delete patrons but expiration dates and blocks not propagated correctly. Fix expected in April.
48	Email order lists to vendors	ACQ	some libraries	2B	
49	User Group preparation	Operations/Support	consortium	2B	
50	Investigate Open Source ILS	ACQ/SER, CAT, CIRC, ILL, OPAC, SYSTEMS	consortium	2B	Demonstrations scheduled for March and April, 2008
51	Investigate Aleph reports alternatives	Reports	consortium	2B	Reports group active
52	Edit list of reports with descriptions	ALL	consortium	2B	Completed November, 2007. Update in progress.
53	Add link to PALS Support Center in Aleph client	Customer Relations	consortium	2B	
54	Resolve MARCIVE issues	Operations/Support	MARCIVE libraries	2C	Currently testing in version 18.
55	Site visits to libraries	Customer Relations	consortium	2C	In progress
56	Determine additional training needs for libraries	Customer Relations	consortium	2C	Additional training being scheduled.
57	Investigate discovery tool components	Discovery	Reference	2D	

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58	Load records such as NetLibrary as required	Operations/Support	some libraries	2D	
59	Saving search aka Search Persistence	WebOPAC	consortium	2E	#4 of top five issues - resolved in version 18?
60	Color Scheme	WebOPAC	consortium	2E	#5 of top five issues
61	Test cash transaction financial interface with MnSCU business office	SYSTEMS, CIRC	MnSCU libraries; others if local business office can handle format	3A	In progress. Fall 2007 Circ User Group requested that workaround be investigated to handle credits.
62	Test EDI with EBSCO for serials claims	ACQ/SER,SYSTEMS	libraries using serials	3A	
63	Test ISO ILL between ALEPH and VDX	ILL	consortium	3A	Some testing done, but problems were encountered and reported to Ex Libris. Fixes expected in April service pack.
64	Conduct booking training for libraries	Upgrade	libraries using Booking	3A	Summer, 2008.
65	Implement Booking	Upgrade	consortium	3A	Summer, 2008.
66	Implement new SDI feature	OPAC	consortium	3A	
67	Test/Implement EDI book claiming	ACQ	some libraries	3B	
68	Test EDI Order Acknowledgments (B&T first)	ACQ	some libraries	3B	
69	Purchase and load new authority file	Operations/Support	consortium	3B	After move to v. 18
70	Implement new v.18 authorities functionality	CAT	consortium	3B	After move to v. 18
71	Version 18: Test authority file processing	CAT, SYSTEMS	consortium	3B	This will include further testing on the debinding feature for topical headings and names & geographic headings and automatic update of headings; after upgrade to version 18.

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72	Investigate Federated Search	Discovery	Reference	3B	
73	Implement Binding	SER	5-6 libraries	3C	
74	Develop online training for forum and wiki	Operations/Support	consortium	3C	
75	Investigate and configure new Z39.50 targets	OPAC, ILL	consortium	4A	
76	Test label printing in Aleph	CAT	consortium	4A	Will test with St. Cloud State University
77	Add STatus field so 'suppressed' can be used in course reserves (like Web OPAC)	Course Reserves	many libraries	4B	Investigating
78	Test EDI with Ambassador	ACQ, SYSTEMS	libraries using ACQ	4B	
79	Identify, then set patrons for deletion based on expiration date (global change) - in preparation for p_cir_77 processing	CIRC, SYSTEMS	all libraries	4C	After fixes for p_cir_77 are in place.
80	Test EDI with Emery Pratt	ACQ	a few libraries	4C	
81	Write documentation and do training for Aleph ILL and OCLC ILL interaction	ILL	ILL staff	4C	
82	Write documentation and do training for Aleph ILL and VDX ILL interaction	ILL	ILL staff	4C	
83	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.
84	SDI Webinar or Tutorial	OPAC, Planning, Training	consortium	4D	
85	Investigate the implementation of hold types (serial/parallel) in the web OPAC.	OPAC	consortium	4E	Functionality will be available in version 18.
86	Investigate LDAP authentication for GUI staff users		some libraries	5A	

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87	Investigate tools to correct help for CCL abbreviations in GUI OPAC client	Client	consortium	5A	
88	Work on Web OPAC help screens--need input from libraries	OPAC	consortium	5A	Samples/volunteer from SMU
89	Version 19: OPAC Course Reserves modifications	OPAC, COURSE RESERVES, SYSTEMS	libraries using CR	5B	Ex Libris development for Version 19
90	Investigate Aleph PDS (Patron Directory Service for user authentication)		consortium	5B	
91	Add configuration to e-mail failed IPIG requests from Zportal to Aleph ILL staff email address	ILL	ILL staff	5C	need workaround
92	Investigate use of Banner interface	ACQ	ACQ	5C	
93	Test and then Load holdings back to OCLC (serials summary holdings update)	CAT,SYSTEMS	consortium	5C	Investigation complete. Record cleanup by libraries is required before a load could be done.
94	Help on Field Tag Information added for OCLC fields	CAT	Cataloging staff	5C	Waiting for Cataloging Steering Committee to provide information.
95	Create an overview Web demo for each module that will allow those that need a brief intro or refresher for using an Aleph client module	Training, ACQ/SER, CAT, CIRC, ILL, OPAC, SYSTEMS	some current staff; possibly new staff	5D	