

PALS Library Services Work Plan

Task Number	Task Name	Functional Area	Who benefits?	Primary Tech Staff Responsible	Primary Support Staff Responsible	Staff Responsible	Priority	Notes
1	Communication with libraries	Customer Relations	consortium	Steve		all	1A	
2	Consultations with Libraries as needed	Customer Relations	library			all	1A	
3	Support and enhance MnPALS Plus	Operations/Support	consortium	Al	Perry		1A	
4	Support the proxy server	Operations/Support	libraries purchasing service	Rod	Dan	Operations	1A	
5	Support wikis and forums	Operations/Support	consortium	Rod	Paul		1A	
6	Keep current on security patches	Operations/Support	consortium	Rod		Rod	1A	
7	Monitor server logs	Operations/Support	consortium	Rod		Rod, Al	1A	
8	System files and data backups	Operations/Support	consortium	Rod		technical staff	1A	
9	Support MnLINK Gateway for member libraries	Operations/Support	consortium	Steve	Perry		1A	
10	Administrative activities (budget, personnel, planning)	Operations/Support	consortium	Steve		administration	1A	
11	Project management	Operations/Support	consortium	Steve		Coordinators, Team Leaders	1A	
12	Build Aleph answerbook	Operations/Support	consortium		Paul	support staff	1A	
13	Maintain ISO interoperability with external servers	Operations/Support	consortium		Sonja		1A	
14	Support Aleph; provide answers to Aleph support calls	Operations/Support	consortium			support staff	1A	
15	Submit SI's to Ex Libris regarding Aleph problems	Operations/Support	consortium			all	1A	
16	Aleph server configuration	Operations/Support	consortium			technical staff	1A	
17	Market PALS products and services	Administrative	consortium	Steve	Mary Ann	Deb, Trudy	1B	
18	Install Aleph service packs	Operations/Support	consortium	Al		technical staff	1B	
19	Load authority record updates	Operations/Support	consortium	Deb	Mary Ann		1B	
20	Review outstanding Aleph SI's, reset priorities, notify Ex Libris of urgent issues	Operations/Support	consortium	Linda		all	1B	
21	Maintain links to external data sources (e.g. patron files, financial data)	Operations/Support	consortium			technical staff	1B	
22	Pull patron and bib record counts for funding formula	Administrative		Al		Trudy	1C	Pull annually on October 1.
23	Negotiate maintenance agreement with Ex Libris	Administrative	consortium	Steve		Steve	1C	Initial proposal from PALS 5/8/07, negotiations session 9/19/07, response received from Ex Libris 6/6/08, counter proposal sent by PALS 7/17/08, response received from Ex Libris 10/31/08.
24	Ongoing Web OPAC changes as requested by libraries	OPAC	consortium		Perry		1C	

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25	Delete patron records	Operations/Support	consortium	Al	Susan		1C	Delete annually in September.
26	Monitor the Ex Libris open platform initiative	Operations/Support	consortium	Al		technical staff	1C	
27	Run service to delete cat fields from bib records	Operations/Support	consortium	Deb	Mary Ann		1C	Run once a year in November.
28	Global changes as requested	Operations/Support	library having change done	Deb			1C	
29	Re-index the complete Aleph database	Operations/Support	consortium	Deb		technical staff	1C	Re-index once a year. Next re-indexing scheduled for 11/22-11/30/08. Production server will be down during the morning of 11/30.
30	Load collection sets of bib records as needed	Operations/Support	some libraries	Deb			1C	
31	Support OCLC LinkManager	Operations/Support	libraries using LinkManager		Perry		1C	
32	Provide training, documentation, and workshops for libraries	Operations/Support	consortium		Sonja	support staff	1C	
33	Provide support to User Groups, Steering Committees, and Task Forces	Operations/Support	consortium			support staff	1C	
34	Reports maintenance	Reports	consortium	Luda	Dan	support staff	1C	Input from libraries via the Reports Group forum.
35	Create new reports as needed	Reports	consortium	Luda	Dan	support staff	1C	Input from libraries via the Reports Group forum.
36	Investigate value-added services	Administrative, SYSTEMS	consortium	Steve			2A	Initial contact made to get price quotes; part of strategic planning
37	Develop and test process where library staff can make global changes to bib records.	CAT	consortium	Deb	Mary Ann		2A	Investigate way to store records that will change so they can be restored if necessary.
38	Set up and test functionality where the item process status is automatically removed when item is circulated by barcode.	CAT	consortium		Mary Ann	Susan	2A	Test libraries are TRM and TRC.
39	Conduct summary holdings training	CAT, SER	consortium		Mary Ann	Dee	2A	
40	Extract serials summary holdings for import by OCLC	CAT,SYSTEMS, SER	consortium	Deb	Mary Ann	Mary Ann,Deb, Dee	2A	In process.
41	Develop communications plan	Customer Relations	consortium	Steve	Susan	PALS Communications Team	2A	Communications Guidelines document produced.
42	Investigate Open URL Link Resolver	Discovery		Deb		Open URL Link Resolver Team	2A	
43	Test ISO ILL between ALEPH and VDX	ILL	consortium	Luda	Sonja	Sonja, Susan, Luda, Al	2A	Fix received in April service pack. Testing is continuing.
44	Add patron e-mail address to lending library's print slip for ILL	ILL			Dan		2A	Requested by ILL User Group, October, 2008

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45	Electronic link	OPAC	consortium		Perry	Perry	2A	#1 of top five issues. (#17) 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.
46	Extract holdings from Aleph for OCLC's LinkManager	Open URL Link Resolver	Libraries using LinkManager	Luda	Perry	Dee	2A	In process.
47	Implement EZProxy	Operations/Support	libraries purchasing service	Rod	Dan		2A	In process.
48	Test functionality of tab_z30 to add holdings and items when loading records	SYSTEMS	consortium	Deb	Mary Ann	Dan	2A	Check if works in conjunction with OCLC loader. Of benefit to libraries that don't use ACQ. Requested by Systems User Group, spring 2008.
49	Hold webinars on preparing ALS reports	SYSTEMS	Academic libraries		Dan		2A	Webinar and follow-up in January, 2009
50	Create document describing which Aleph reports to run for ALS reports	SYSTEMS	Academic libraries		Dan		2A	
51	Test interface with InterACQ (Midwest collection manager)	ACQ/SER	libraries using Midwest	Deb	Dee		2B	Requested by ACQ/SER User Group, October, 2008
52	Test interface with Title Source (B&T collection manager)	ACQ/SER	libraries using Baker and Taylor	Deb	Dee		2B	Requested by ACQ/SER User Group, October, 2008
53	Investigate Open Source ILS	ACQ/SER, CAT, CIRC, ILL, OPAC, SYSTEMS	consortium	Linda	Dee	OLS Team	2B	
54	Offer forums to library groups outside the consortium	Customer Relations		Rod	Susan		2B	
55	Add link to PALS Support Center in Aleph client	Customer Relations	consortium		Dan		2B	
56	Investigate LDAP authentication with MnPALS Plus	MnPALS Plus	consortium	Al	Perry		2B	
57	Add 880 tags to OPAC main record display for foreign language titles	OPAC	consortium		Perry		2B	Requested by Reference User Group, October, 2008.
58	Display 866 867 and 868, 538, 506, 843, and 845 on Holdings page	OPAC	consortium		Perry		2B	Requested by Reference User Group, October, 2008. Implement on test server for review first.
59	Open Google books link in a new page in the OPAC	OPAC	consortium		Perry		2B	Requested by Reference User Group, October, 2008.
60	Investigate moving server support to MnSCU	Operations/Support		Rod		Stephen, Al	2B	
61	User Group preparation	Operations/Support	consortium		Perry	all	2B	

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62	Investigate LDAP authentication with the Aleph Web OPAC	SYSTEMS, OPAC	consortium	Al	Dan	Perry	2B	LDAP server needs to have Aleph identifying information (reg id/tech id?). Requested by Systems User Group, spring 2008.
63	Do test Aleph version 19 upgrade	Upgrade	consortium	Al		Deb	2B	November, 2008
64	Email order lists to vendors	ACQ	some libraries	Deb	Dee	Dee, Deb	2C	
65	Implement new v.18 authorities functionality and reindex database	CAT	consortium	Deb	Mary Ann		2C	
66	Version 18: Test authority file processing	CAT, SYSTEMS	consortium	Deb	Mary Ann		2C	This will include further testing on the debinding feature for topical headings and names & geographic headings and automatic update of headings.
67	Add column to consortium members list to indicate if library enters patrons in Aleph	Circ				Susan	2C	Requested by Circulation User Group, October, 2008
68	Remove TYP <Print Book> from Course Reserves display	Course Reserves	libraries using Course Reserves	Al	Mary Ann		2C	Requested by Course Reserves libraries, October, 2008
69	Determine additional training needs for libraries	Customer Relations	consortium		Sonja	support staff	2C	Additional training being scheduled.
70	Site visits to libraries	Customer Relations	consortium			support staff	2C	In progress
71	Investigate Federated Search	Discovery		Linda	Mary Ann	Discovery Tools Team	2C	
72	Change ILL blank forms for serials and monographs: remove mandatory designation and add clarifying sentence	ILL	consortium		Perry	Sonja	2C	Requested by ILL User Group, October, 2008
73	Change ILL blank form for serials: change 'Source' to 'Source of Citation'. Investigate whether help button could be added.	ILL	consortium		Perry	Sonja	2C	Requested by ILL User Group, October, 2008
74	Add column to consortium members list to indicate if library is a direct borrower/lender for ILL	ILL	libraries doing direct borrowing			Sonja	2C	Requested by ILL User Group, October, 2008
75	Purchase and load new authority file	Operations/Support	consortium	Deb	Mary Ann		2C	Planned for spring, 2009
76	Evaluate functionality of version 19 on the test server.	Operations/Support	consortium	Deb		all	2C	Install completed Oct. 9, 2008.
77	Test EDI with EBSCO for serials claims	ACQ/SER, SYSTEMS	libraries using serials	Deb	Dee		2D	
78	Investigate discovery tool components	Discovery		Al	Mary Ann	Discovery Tools Team	2D	
79	Implement EDI book invoices	ACQ		Deb	Dee		3A	Requested by SER/ACQ User Group, October, 2008
80	Prepare booking and media maintenance training for libraries	Booking	libraries using Booking		New support staff		3A	
81	Conduct booking training for libraries	Booking	libraries using Booking		New support staff		3A	First session held summer, 2008.
82	Test ISO ILL between Aleph and OCLC	ILL	consortium	Luda	Sonja		3A	We have done an initial round of testing with OCLC and have reported specific problems to ExLibris; discussions with Ex Libris are ongoing.
83	Implement ISO ILL between Aleph and OCLC	ILL	consortium		Sonja		3A	
84	Investigate how MnSCU's STARS project (single sign-on) will affect authentication for patrons	OPAC	MnSCU libraries	Al	Perry		3A	Todd Digby is on the MnSCU committee working on STARS.

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85	Implement new SDI feature	OPAC	consortium		Perry	Perry	3A	Investigating. Some progress has been made. Problems reported to Ex Libris.
86	Test/Implement EDI book claiming	ACQ	some libraries	Deb	Dee		3B	
87	Test EDI Order Acknowledgments (B&T first)	ACQ	some libraries	Deb	Dee		3B	
88	Change end date in subscription records from 12/31/2010 to 12/31/2025.	ACQ/SER	libraries using serials	Deb	Dee		3B	Requested by ACQ/SER User Group, spring 2008
89	Remove availability status from union view of the OPAC	OPAC	consortium		Perry		3C	
90	Resolve MARCIVE loader table issue	Operations/Support	MARCIVE libraries	Deb	Mary Ann		3C	Waiting for fix from Ex Libris.
91	Develop online training for forum and wiki	Operations/Support	consortium		Susan	Communications Team	3C	
92	Implement Binding	SER	5-6 libraries	Deb	Dee		3C	
93	Test label printing in Aleph	CAT	consortium		Mary Ann		4A	Will test with St. Cloud State University
94	Investigate and configure new Z39.50 targets	OPAC, ILL	consortium		Perry		4A	Libraries need to submit a request.
95	Test EDI with Ambassador	ACQ, SYSTEMS	libraries using ACQ	Deb	Dee		4B	
96	Test EDI with Emery Pratt	ACQ	a few libraries	Deb	Dee		4C	
97	Write documentation and do training for Aleph ILL and VDX ILL interaction	ILL	ILL staff		Sonja	Sonja, Susan	4C	
98	Write documentation and do training for Aleph ILL and OCLC ILL interaction	ILL	ILL staff		Sonja	Sonja, Susan	4C	
99	open_window javascript function needs to be rewritten	OPAC	libraries with Netlibrary records	Al	Perry	Perry, Al	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.
100	Saving search/Search Persistence	OPAC	consortium		Perry	Perry	4D	#4 of top five issues.
101	Color Scheme	OPAC	consortium		Perry	Perry	4D	#5 of top five issues; waiting for interested library.
102	SDI Webinar or Tutorial	OPAC, Planning, Training	consortium		Perry	Perry	4D	
103	Investigate the implementation of hold types (serial/parallel) in the web OPAC.	OPAC	consortium		Perry	Perry	4E	On hold - no library has expressed interest in this functionality.
104	Investigate tools to correct help for CCL abbreviations in GUI OPAC client	Client	consortium		Dan	Dan	5A	
105	Work on Web OPAC help screens--need input from libraries	OPAC	consortium		Perry	Perry	5A	Samples/volunteer from SMU. In progress.
106	Investigate LDAP authentication for GUI staff users	SYSTEMS, OPAC	some libraries	Al			5A	
107	Test functionality such as authentication, ILL, and Z39.50 connections between Aleph and OCLC's Navigator	Gateway interface	consortium	Al	Sonja	Perry	5B	Navigator will replace ZPortal as the MnLINK Gateway search interface, expected in 2010 or 2011.
108	Investigate Aleph PDS (Patron Directory Service for user authentication)	SYSTEMS, OPAC	consortium	Al	Perry	Perry, Al	5B	

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109	Investigate use of Banner interface	ACQ	ACQ	Deb	Dee	Dee,Deb	5C	
110	Help on Field Tag Information added for OCLC fields	CAT	Cataloging staff		Mary Ann	Mary Ann,Dan,Paul	5C	Waiting for Cataloging Steering Committee to provide information.
111	Add configuration to e-mail failed IPIG requests from Zportal to Aleph ILL staff email address	ILL	ILL staff	Al	Sonja		5C	need workaround
112	Test supported cash export process with MnSCU	SYSTEMS, CIRC	MnSCU libraries; others if local business office can handle format	Al	Susan		5D	Aleph only supports export of cash debits to an external office. Submitted enhancement request for support of credits. Aleph will not support synchronizing transactions in two places.
113	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		Sonja	Support staff	5D	
114	Check if new patron can have their initial password set to their last name.	CIRC	CIRC	Al	Susan	Al, Susan	6A	Requested by CIRC User Group, Fall, 2007. Not currently possible, requested fix from Ex Libris. Ex Libris has determined that this is an enhancement request.