

Completed project tasks

Office Work Plan					
Task Number	Task Name	Functional Area	Priority	Completion Date	Notes
1	Patron Load InterFace development	CIRC, SYSTEMS	1		Needed for beta libraries and gamma libraries; in testing
2	Oracle database reorganization to reset some parameters	SYSTEMS	1	12/23/2003	
3	Production Load data review		1	2/24/2004	pending additional planning with Ex Libris
4	Production data load report compiled for ExL		1	2/25/2004	pending additional planning with Ex Libris
9	Test ISO ILL between VDX and ALEPH	ILL	1		Duplicate of 7
12	Build Aleph answerbook	Operations	1		Moved to operations
13	Gamma libraries STP		1		Support staff to be onsite at each library on STP day
14	Test authority loader (have files from July 2003 that need to be loaded)	CAT, SYSTEMS	1		Testing is in progress; updates of authority records will be done post gamma STP; once updating begins estimate processing time will be about 60 hours
17	Backup oracle spaces on harp before merge begins	SYSTEMS	1	2/10/2004	Depends on when ExL begins merging data into master area on harp; need backup in case merge process has problems; firm date will be determined later
18	Open gamma libraries on harp	SYSTEMS	1	2/23/2004	
20	Copy gamma libraries' Aleph tables and permissions from lute to harp	SYSTEMS	1	2/23/2004	Any table changes or permissions after February 6 until STP need to be tracked and manually applied after production area released to libraries; gamma libraries will notify PALS office if changes have been made

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21	Copy gamma libraries' Aleph permissions from lute to harp	SYSTEMS	1	1/5/2004	Any table changes or permissions after January 9 need to be tracked and manually applied after production area released to libraries
22	Test circ between ADM's	CIRC	1		is this satisfactorily completed?
23	Extract Production data	SYSTEMS	1	2-Feb-04	Schedule was delayed by a week
24	Review top 10 list	Development	1	8-Mar-04	Reviewed; made sure open issues still on development list
25	Review December 2002 development list	Development	1	8-Mar-04	Reviewed; made sure open issues still on development list
26	Shut off all cataloging for gamma libraries	SYSTEMS	1	22-Jan-04	Schedule was delayed by a week
30	Complete indexing following gamma STP	SYSTEMS	1		Estimated time
31	Copy beta libraries bib file for downtime	SYSTEMS	1	23-Dec-03	
33	Test EDI with EBSCO for serial invoices	ACQ, SER, SYSTEMS	1		EBSCO identified for beta libraries; will add gamma library's vendors to list soon; Problem reported on Clientele ticket 21529
34	Review patron load for SCS done by Ex Libris	SYSTEMS	1		
35	Update Aleph Migration Plan (re-arrange libraries that requested change)	Planning	1	3/22/2004	Currently in progress
36	In circ, test local check box performance fix	CIRC, SYSTEMS	1		Per contract, testing could take up to 90 calendar days; local check box enhancement added in 15.5.2 with corrections installed with the service-pack loaded in January; Problem has been reported to Ex Libris in PRB 7886
37	Update Clientele problems list and send to Ex Libris	Operations	1		
38	Printing and Task Manager Training, Rochester	Training	1	20-Jan-04	
39	Tables Consultation, Rochester	Training	1	21-Jan-04	

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40	Distribute 15.5.2 client to beta and gamma libraries	Operations	1	3-Feb-04	
43	Upgrade Sun production server	SYSTEMS	1		Equipment will be ordered mid-March; delivery and installation will be scheduled
44	Proxy server development	SYSTEMS	1		Now in production at one library
45	Proxy server documentation	SYSTEMS	1		
46	Proxy server implementation	SYSTEMS	1		
47	Proxy server initial support	Operations	1		
50	Implement new version of VDX	Gateway	1	19-Mar-04	
51	Prepare and present Webinar training for new VDX features	Gateway	1	March 4-5, 2004	
52	Create VDX Groups for DocFind	Gateway	1	March 4-5, 2004	Will lessen impact on Gateway servers
54	Revise Aleph vocabulary list	Training	1		
92	Write procedure for loading Marcive records	CAT, SYSTEMS	1		
143	Keyword and browse options merged into one drop down menu on the basic search page	OPAC, SYSTEMS	1		
146	Call number of full record	OPAC, SYSTEMS	1		
151	Create Web-based tutorial for Changing Fiscal Years	Training, ACQ	1		
152	Review and revise server policies in preparation of firewall	SYSTEMS, Security	1		
154	Plan installation of firewall	SYSTEMS, Security	1		
155	Install firewall	SYSTEMS, Security	1		
156	Test server connections through firewall	SYSTEMS, Security	1		
157	Update PALS staff regarding firewall changes	SYSTEMS, Security	1		
199	Install disk storage unit	SYSTEMS	1		

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200	Re-allocate disk allocations for lute and harp	SYSTEMS	1		
201	Conference calls with delta libraries	Planning	1		
206	Write PRB about cash-09 problem	SYSTEMS	1		
211	Update Delta Library Group migration plan	Planning	1		
223	Install service pack that includes marcive loader	Planning	1		
229	Conduct Migration Workshop in Duluth	Training	1		
230	Conduct Migration Workshop in Moorhead	Training	1		
247	Create area on lute for test install of version 17	SYSTEMS	1		
248	Copy beta and gamma production data and tables to version 17 test area	SYSTEMS	1		
249	Write definition of a quality software installation	Administrative	1		
258	Create slice on disk for version 16/17 install	SYSTEMS	1		
259	Create slice on new disk for copy of 15.5 data	SYSTEMS	1		
266	Add fields to Nav Map short doc display (tab33.eng)	CAT,SYSTEMS	1		
269	Ask for volunteers for validation study group	CAT	1		In consultation with DBQMTF/Cat User Group
275	Content validation for unique identifiers (don't want validation on content--	CAT	1		
285	Identify duplicate usernames	SYSTEMS	1	3/23/2005	Needs to go to libraries
15	Test Course Reserves batch processing	COURSE RESERVES	1	Low	Test after installation of next version of software
286	Write procedure for eliminating duplicate usernames	SYSTEMS	1		review procedure, then send
287	Prepare area for Aleph Reporting Center on server	SYSTEMS	1		waiting for additional disk
16	Test Course Reserves save files accessibility.	COURSE RESERVES	1	Low	Setup issue

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221	Review acceptance testing scripts	Planning	1		In progress
228	Define Aleph buddy concept	Planning	1		
53	Input availability definitions in VDX	Gateway	1	Medium	Will input as Gateway servers provide information; FDI is doing
311	Add TdS to Gateway	Gateway	1		
222	Test using acceptance testing scripts practicing with version 17	Planning	1		in progress
186	Plan Epsilon group migration	Planning	1		In progress
187	Plan Zeta group migration	Planning	1		In progress
133	Test spine label printing; write procedure	SYSTEMS, CAT	1		Ask LaSSSI group; couple of sites have written spine label program; almost completed
302	Add Aleph system number to drop down menu in advance browse search	WebOPAC	1	Medium	WebOPAC issues #68
284	Arrange for testing SYS60 pattern templates before removing them	CAT,SER	1	High	will work on in Version 17
236	Perform acceptance testing for version 17	ACQ/SER,CAT, CIRC,ILL,OPAC, SYSTEMS	1		ILL, Arc, Booking; have tested ILL & Booking so far
120	Test booking functionality	Development	1	High	Expect testing to be iterative
160	Document Aleph ISO ILL problems detected during testing	ILL	1	High	Included in line 5
161	Re-test Aleph ILL following delivery of server packs	ILL	1	High	Included in line 5
8	Test ISO ILL between VDX and PALS	ILL, GATEWAY	1	High	in process; bugs fixed as found
6	Test ISO ILL between ALEPH and PALS	ILL	1	High	ongoing
224	Configure new help desk software	Planning	1		Waiting for data

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Task Number	Task Name	Functional Area	Priority	Completion Date	Notes
316	Configure harp for ILL	ILL	1	Nov-05	in progress
225	Put new help desk software into production	Planning	1	Oct-05	
324	Collection maps for eta group	Support	1		Waiting for one
41	Test delete functionality of p_cir_77 (patron architecture issue)	SYSTEMS	1	Medium	In testing; will be in version 17; has been tested works in 17
318	Set up 555 region for conversions	Systems	1		
319	Set up 575 region for conversions	Systems	1		
320	Set up 525 region on lute for conversions	Systems	1		
323	Set up tables for reindexing	Systems	1		
153	Document server weekend on-call procedures	SYSTEMS, Security	1	High	
304	option screen to "find other records" in the catalog	WebOPAC	1	Low	WebOPAC issues #74
321	Set up harp for epsilon/zeta group	Systems	1		
56	Load all authority updates since July 2003	SYSTEMS	2		
60	Plan delta group migration	Planning	2		Planning started with delta groups at Migration Preparation workshops on March 18 and March 25
64	Configure 16.02 on test server	SYSTEMS	2		
65	16.02 GUI Client training	Training	2		
66	Determine best method for migrating rest of libraries	Planning	2		Have discussed with Ex Libris
67	Respond to TdS & Pioneerland RFP	Planning	2		
72	Plan pre-migration workshops	Training	2	26-Feb-04	Write goals and objectives for workshop; plan content
74	15.5.2 installed on production server	SYSTEMS	2	2/6/2004	
75	Schedule data merge planning meeting with Minnesota West	Planning	2		
76	MnLINK User Group meeting	Meetings	2		
77	Delete beta libraries records	SYSTEMS	2	Nov-03	
84	Schedule/complete conversion process training	SYSTEMS	2		
86	Planning with delta group	Planning	2		Duplicate of 60

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87	Identify libraries for delta group to replace Twin Cities 2 year campuses	Planning	2	17-Mar-04	CALCO libraries, St. Mary's, Southeach Technical College added
91	Test Marcive loader	SYSTEMS	2		Following successful testing, provide load instructions for beta libraries; problem has been identified and reported to Ex Libris on Clientele ticket 20634
107	Fiscal year rollover update for Aleph libraries	ACQ	2		Possibly via Webinar
147	Boolean operators available on advanced search page	OPAC, SYSTEMS	2		
148	Remove 'Number of docs' column on advanced search page	OPAC, SYSTEMS	2		
150	Prepare to instruct Library staff in use of Web OPAC	Training, OPAC	2		
162	Plan installation of VDX 2.6.1	Gateway	2		
163	Install VDX 2.6.1	Gateway	2		
253	Aleph libraries	SYSTEMS	2	18-Feb-05	Not feasible since V 17 is installed
267	Establish Indexing Task Force	CAT	2		In consultation with DBQMTF/Cat User Group
277	Library statistics for Aleph libraries	Planning, SYSTEMS	2		
69	Test new features in 16.02		2		These features are being tested with version 17 testing.
268	Activate authority study group	CAT	2	First meeting April 18 or 19, 2005	In consultation with DBQMTF/Cat User Group
105	Test MARC8 bibliographic extract (from Unicode to OCLC format)	SYSTEMS	2	Low	
144	Improving retrieval limit options	OPAC, SYSTEMS	2		will be in version 17
89	Booking data conversion; specs and data review	Planning	2		Dependent on delivery of Booking software from Ex Libris and how many
85	Global changes in Aleph	SYSTEMS	2	Medium	On charges document
93	Load Marcive files for beta libraries since July 2003	SYSTEMS	2	Medium	SCS completed; SBJ completed
61	ILL Functional Training by Ex Libris (if needed)	Training	2	High	Not needed

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226	Review Ex Libris version 17 training materials	Planning	2		there aren't any
254	Put any documentation about version 16 on Aleph secure page	SYSTEMS	2		
191	Schedule training calendar for eta group libraries	Planning	2		in progress
188	Plan Eta group migration	Planning	2		
231	Conduct Migration Workshop in Twin Cities	Training	2		Two sessions scheduled in August
298	Implement course reserves save files for faculty	CR	2		Perry follow up with Mary Ann
306	Display of 856 subfields in OPAC	WebOPAC	2	Medium	WebOPAC issues #21, Sent to Ex Libris PRB 10910; PRB closed; works in version 17
308	Search terms listed in drop down box on basic search page be revised and rearranged	WebOPAC	2	High	WebOPAC issues #32
245	Plan for workflow changes due to new version	ACQ/SER,CAT, CIRC,ILL,OPAC, SYSTEMS	2		
208	Write job description for student worker	Administrative	2		
57	Union view benchmark testing; work to improve performance	SYSTEMS	2	High	
203	Write PRB for item-04 problem	SYSTEMS	2		
309	Only display valid ISSN and ISBN numbers in public webopac	WebOPAC	2	Medium	WebOPAC issues #85, Invalid numbers will display in MARC tag view; little fix, AI will do or has done
95	Contract re-negotiation	Development	3		Date not yet determined
96	Spring PALS Users Group prep/meeting	Meetings	3		
98	Convert delta group records	SYSTEMS	3		
99	Schedule Pre-migration workshops	Planning	3		Determine dates and locations; advertise workshops
100	Test circulation overnight batch process	CIRC	3		In process
101	Test all acquisitions batch services	ACQ	3		In process

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102	Test all circulation batch services	CIRC	3		In process
103	Test all serials batch services	SER	3		In process
104	Test all items batch services	CIRC	3		In process
106	Test all cataloging batch services	CAT	3		
108	Conduct pre-migration planning workshop	Training	3		Will offer workshop at regular intervals
109	Extract delta group records	SYSTEMS	3		
111	Install 16.02 on production server (harp)	SYSTEMS	3	3 days	Skipped V16 on ExL's recommendation
112	Install 16.03 on test server; then test	SYSTEMS	3		On March 9, 2004 learned that Ex
113	Test new features in 16.03		3		On March 9, 2004 learned that Ex Libris is not planning a 16.03 release; rather development will be in version 17
118	Test revised indexing and determine needed changes	CAT, OPAC	3		Goal is to work with MnPALS libraries and identify changes needed prior to delta group stp
158	Load netlibrary records	CATALOGING, OPAC, SYSTEMS	3		
164	Test installation of VDX 2.6.1 before going into production	Gateway	3		
165	Document problems found in VDX 2.6.1 and send to vendor	Gateway	3		
166	Retest fixed problems found in VDX 2.6.1	Gateway	3		
167	Prepare training materials for new functionality of VDX 2.6.1	Gateway	3		
168	Train users on new functionality of VDX 2.6.1	Gateway	3		
169	Put VDX 2.6.1 into production	Gateway	3		
189	Schedule training calendar for epsilon group libraries	Planning	3		
190	Schedule training calendar for zeta group libraries	Planning	3		
271	856 hyperlink in holdings display	CAT,SYSTEMS	3		completed

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256	Determine content of advanced systems training	Planning	3		done
212	Create Advanced Web OPAC tutorial	Training	3		done via webmeeting; will consider later for version 17 and beyond
290	Keep VDX/ZPORTAL training materials current as long as we have GW responsibility	Gateway	3		
159	Coordinate ISO ILL testing between Pioneerland and Plum Creek	ILL, GATEWAY	3	Medium	
227	Customize version 17 training materials	ACQ/SER,CAT, CIRC,ILL,OPAC,	3		really don't have any
270	856 display in WebOPAC (subfield y)	CAT,SYSTEMS	3		operational, but brings up a pop-up box in 15; works in 17
55	Identify and discuss issues relating to cataloging for 2 year schools that are merged into one ADM in Aleph	CAT, SYSTEMS	3		This will be an ongoing process
279	Plan/write statement explaining OPAC views	OPAC	3		Why union view instead of other library's server? Will change with version 17
282	Web OPAC Customization for individual libraries	OPAC/SYSTEMS	3	Medium	duplicate of xxx
58	Figure out how libraries will access their web pages for customization (OPAC	SYSTEMS	3	High	duplicate of xxx
126	Open delta libraries on lute	SYSTEMS	4		
128	Install version 16.3 on production server	SYSTEMS	4		Version cancelled by Ex Libris; next version will be 17
129	Site visits to delta group libraries	Planning	4		
130	Schedule training calendar for delta group libraries	Planning	4		
176	Put ZPORTAL 3.0 into production	Gateway	4	20-Jan-05	
257	LibProxy with SFX development	SYSTEMS	4		
294	Development for WebPALS--mask institution symbols	Cataloging	4	3/23/2005	Clientele ticket #27531
205	Test PDA access with Aleph	OPAC,SYSTEMS	4		
216	Create EDI Invoicing Tutorial	Training	4		Did webmeeting with libraries
125	Test OCLC overlay	CAT	4	Low	Resolved with 945 match field

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272	Establish mechanism to track & report authority display and functionality issues	CAT	4		Group is doing it
273	Create online form to submit ideas (accepted, rejected status)	CAT	4		Is this for indexing and authorities? Groups are designing
235	Prepare advanced systems training	SYSTEMS	4		Completed
209	Plan for version 17 install with Ex Libris	Planning	4		
255	Review best practice for distributing documentation to migrating libraries	Planning	4		
121	Booking Functional Training provided by Ex Libris	Development	4	High	Do we want?
215	Create Spine Labeling tutorial	Training	4		
135	NAAUG in Boston	Meetings	5		Moved to operations
136	Review of STP process with gamma libraries	Planning	5		
137	Evaluation of implementation process	Planning	5		
139	Submit final list of Post STP issues		5		to Ex Libris
140	Determine any additional support needs		5		work with PALS
177	Plan installation of VDX 2.7	Gateway	5		
178	Install VDX 2.7	Gateway	5		
179	Test installation of VDX 2.7 before going into production	Gateway	5		
180	Document problems found in VDX 2.7 and send to vendor	Gateway	5		
181	Retest fixed problems found in VDX 2.7	Gateway	5		
182	Prepare training materials for new functionality of VDX 2.7	Gateway	5		
183	2.7	Gateway	5		
184	Put VDX 2.7 into production	Gateway	5		
185	Review call tracking software's customer service interface	Planning	5		
170	Plan installation of ZPORTAL 3.0	Gateway	5		
171	Install ZPORTAL 3.0	Gateway	5		
172	Test installation of ZPORTAL 3.0 before going into production	Gateway	5		

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173	Document problems found in ZPORTAL 3.0 and send to vendor	Gateway	5		
174	Retest fixed problems found in ZPORTAL 3.0	Gateway	5		
175	Train users on new functionality of ZPORTAL 3.0	Gateway	5		
252	Prepare training materials for ZPORTAL 3.0	Gateway	5		
289	Add location, call number, and status display when using the Hooks to Holdings feature in BIP	SYSTEMS	5		only handle MARC records, we return opac record; can't be done
204	Create Intro to Aleph web tutorial	Training,SYSTEMS	5		
114	a. Inventory	CIRC			On March 9, 2004 learned that Ex Libris is not planning a 16.03 release; rather development will be in version 17
115	b. Binding	ACQ/SER			On March 9, 2004 learned that Ex Libris is not planning a 16.03 release; rather development will be in version 17
116	c. Others?				On March 9, 2004 learned that Ex Libris is not planning a 16.03 release; rather development will be in version 17
192	Post production site visits to gamma libraries				
195	Study and learn serials module, 15.5.2 and beyond	ACQ/SER			
269	Add new word index WCI	CAT		2 days	Needs to be done by 10/2005
270	New "find" index, series work	Web OPAC		hours	Needs to be done by 10/2005
70	a. Test ILL priority 2 enhancements	ILL			