

Work Plan

Task Number	Task Name	Functional Area	Priority	Estimated Effort/Target Date	Notes
	Office Work Plan				
336	Plan implementation of version 17	All	1		
80	Test EDI with Midwest for book orders	ACQ, SYSTEMS	1	Medium	in progress
82	Test EDI with Blackwell for book orders	ACQ, SYSTEMS	1	Medium	in progress; for MSU
244	Learn implications of architecture change	ACQ/SER,CAT,CIRC, ILL,OPAC,SYSTEMS	1	Jul-06	Need to do planning
234	Test EDI with EBSCO for serials claims	ACQ/SER,SYSTEMS	1		Ebsco ready to do testing; SBJ will be the test library; This is in progress; PRB 13359 has been submitted to ExLibris; fix received, needs to be tested
243	Track acceptance testing problems	Administrative	1		
42	Development meetings (ILL)	Development	1	Medium	ILL meetings continue
5	Test Aleph ILL functionality	ILL	1	High	Ongoing
232	Test ISO ILL between Aleph servers	ILL	1	High	Working with Minitex and U of Mn; testing as can, have needed fixes from ExL
313	Test ISO ILL between Aleph and OCLC	ILL	1		ExL reported that testing has begun; ExL reported on March 22, 2006 that testing was
317	ISO setup on PALS and Aleph for interoperability	ILL	1	High	ongoing:
63	Conduct ILL training for libraries	ILL	1	May-06	In progress
333	Implement FuseTalk	Online Learning	1		
295	Proxy server enhancement--off-campus access to netLibrary records	Proxy Server	1		Clientele ticket #27423; requires purchasing new server; Rod sent email to users no one has set it up yet; in testing with SSU and RVL;
94	Load Marcive files for gamma libraries since January 2004	SYSTEMS	1	Medium	Waiting for resolution from Ex Libris; loaded for GAC on lute; new (BIG) problem sent to ExL;
149	Update PALS home page	SYSTEMS	1		Perry will arrange meeting with MSU IT; meeting is scheduled for April 14
299	Change revise and filter links to modify and limit	WebOPAC	1	Medium/April UG	WebOPAC issues #26; Plan to have done by 2006 Spring Users Group
301	Advance search page year limit: provide an example showing range of dates	WebOPAC	1	Medium/April UG	WebOPAC issues #30, range searching is now working on version 15.5

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305	Recommend placing call number prefix after the words call number	WebOPAC	1	High	WebOPAC issues #76, we can leave as is, put after collection but if no call number it will still display; if no \$k call number label will not display; going back to MAFT for explanation
336	Plan implementation of version 17	All	1		
79	Test EDI with B&T for book and entertainment orders	ACQ, SYSTEMS	2	Medium	sent batch to B&T; working with Cedric; ordering part is complete, the order acknowledgement piece is in progress.
194	Set up and test emailing order lists to vendors	ACQ/SER	2		MSU is doing this now
239	Test Aleph Reporting Center	ACQ/SER,CAT,CIRC, ILL,OPAC,SYSTEMS	2		some testing has been done; how to support?; figure out licensing; schedule ARC discussion; decided to form a group to look at reporting needs, evaluate ARC
260	Validation tables updated	CAT	2	High	In progress; committee's current recommendations being added
261	Remove "This is a duplicate in the index" up to 5 times	CAT,SYSTEMS	2		tags validated in OCLC being removed; will take care of 85% of problems
292	Test import of OCLC records using Connexion	Cataloging	2		Clientele ticket #25195; working with OCLC & MINITEX; needs to be further pursued
293	Investigate import of OCLC records using CatExpress	Cataloging	2		Will need to know by Eta group--Rush City and MSB
73	Authentication doesn't work	CIRC, SYSTEMS	2	Low	Problem reported to Ex Libris on Clientele ticket 22324; closed ticket because does work in 17; doesn't work in 15.5; AI to test
314	Add configuration to e-mail failed IPIG requests from Zportal to PALS ILL staff email address	ILL	2		need workaround
315	Add configuration to e-mail failed IPIG requests from Zportal to Aleph LL staff email address	ILL	2		need workaround

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276	Add note to logon screen explaining what the password is	OPAC	2		SBJ sent recommendation; will be made available for libraries' evaluation; January MATF meeting
145	OPAC Course Reserves modifications	OPAC, COURSE RESERVES, SYSTEMS	2		need to document; maybe create a trauma team for CR
90	Refine the MARC tag sort order for displays (tab01)	OPAC, SYSTEMS	2		Can't do exactly what the libraries requested; PRB #; Mary Ann and Perry will look to see what this is about
334	Investigate Aleph reporting alternatives	Reports	2		To be determined
88	Distribute 17 GUI client	SYSTEMS	2		Date to be determined
48	Training preparation for version 17 client	Training	2		To be determined
193	Prepare documentation (perhaps Web based training) for version 17 GUI client	Training	2		To be determined
300	Explore sort options in WebOPAC	WebOPAC	2	High	WebOPAC issues #27; will implement in version 17'
303	Add option to sort results by date, author, title	WebOPAC	2	Medium	WebOPAC issues #69; will implement in version 17
310	Change links in header (basic, advanced command)	WebOPAC	2	Medium	WebOPAC issues #88; partially implemented on lute, still some work to do, to change needs to change 2 header files per library
329	Search Limits Added to Basic Search Page (v. 17). For version 17, the Task Force recommends that limits on the Basic Search page be retained as delivered out-of-the-box, and that the Filter button (which is to be renamed Limits in v. 15) be eliminated when v. 17 is implemented.	WebOPAC	2		WebOPAC issue #91; version 17 issue; The Task Force further recommends that the limits on the Advanced Search page of our v. 15 NOT be moved forward, as
331	Course reserve indexes added to the dropdown for Advanced Browse	WebOPAC, Course Reserves	2		In the WebOPAC, none of the course reserve indexes are
81	Test EDI with Book House for book orders	ACQ, SYSTEMS	3	Medium	
246	Negotiate maintenance agreement with Ex Libris	Administrative	3		In negotiations; waiting for Ex Libris response
132	Investigate exporting bib records from MnPALS to OCLC	CAT, SYSTEMS	3		Talked to CCLA & FCLA; can't do in 15
124	Test functionality of OWN control	CAT, SYSTEMS	3	Low	Changes in version 17
262	Load holdings back to OCLC	CAT, Planning, SYSTEMS	3	Medium	Need to find p_export_02 in 15; can't do in version 15

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264	Remove SYS60 pattern prediction templates	CAT,SYSTEMS	3		Mary Ann ask ExL?
265	Place SYS60 pattern prediction templates on website	CAT,SYSTEMS	3		put template directory on web
251	Review/evaluate rejected authority records	CAT,SYSTEMS	3		needs to be addressed before PALS is shut down by version 17
325	URL report via p-print-08	Cataloging	3	Low	AI indicated it would be easy for him to re-construct the URL checker in Aleph and then have it print via p-print-08 in 15.5; built into 17; defer to 17.
312	Aleph Digital Assets Module thumbnails?	Cataloging	3		version 17; work with MSU,Mankato Daardi Sizemore
330	Help Window for 853X in SYS60	Cataloging	3		The help in this window should be expanded; sent to Bobby Bothman
263	Ask EL for tools(s) to correct CCL abbreviations in GUI OPAC client	Client	3		look at version 17; need RoboHelp (there's a new name)
131	Profile maintenance at ADM rather than SYS	Development	3		Request sent to Ex Libris; action determined after we get an answer
7	Test ISO ILL between ALEPH and VDX	ILL	3	High	in progress
197	Work on Web OPAC help screens--need input from libraries	OPAC	3	Meduim	needed; samples from MHS; now in discussion
142	Format limiting (tab_type_config)	OPAC, SYSTEMS	3	High	Indexing & Access task forces need to provide input. WebOPAC issues #72; could be more than one; new ones in place; order started; on hold
207	Write API for cash transactions transfer	SYSTEMS	3		
198	Write program for inventory collection and transfer to Aleph (for Percon units)	SYSTEMS	3		In testing
97	Remove gamma and delta library data from PALS	SYSTEMS	3	Medium	after Aleph ILL implemented
241	Conduct training for Aleph Reporting Center for libraries	SYSTEMS	3		All ARC training web-based
322	Set up harp for eta group	Systems	3	Apr-06	in progress
110	Test cash transaction financial interface with MnSCU business office	SYSTEMS, CIRC	3	Medium	In progress
59	Prepare HTML customization training for MnPALS libraries	Training	3	High	HTML changes in version 17; early planning stages
127	Test summary holdings display in OPAC	CAT, OPAC, SER, SYSTEMS	4	Medium	For version 17

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32	Test EDI with YBP for book orders	ACQ, SYSTEMS	4	Medium	
83	Test EDI with Ambassador	ACQ, SYSTEMS	4	Medium	
274	Help on Field Tag Information added for OCLC fields	CAT	4		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
280	Change in practice for nonfiling characters (diacritics)	Cataloging	4		DBQM
122	Prepare booking training for libraries	Development	4	High	After version 17 live
123	Conduct booking training for libraries	Development	4	High	After version 17 live
10	Write documentation about ISO ILL functionality	ILL	4	High	
11	Conduct workshops about ISO ILL functionality	ILL	4	High	
283	SDI Webinar or Tutorial	OPAC,Planning,Training	4	Medium	Available with version 17
233	Conduct HTML customization training	OPAC,SYSTEMS	4	High	After version 17 live
335	Service to identify unlinked holdings and items	Reports	4		Report to identify "unlinked items and holdings". We have run this previously for libraries after migration and continue to get the occasional request for it. Add this as a service in the task manager.
296	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	4	Low	Refer to Clientele ticket number 27493 for detail. one-time new batch service
291	Investigate encoding the barcode number on to the magnetic stripe on ID cards.	SYSTEMS,Circ	4		Clientele ticket #25069; look at ticket
242	Re-train all libraries on version 17	Training	4		
213	Create Offline Circulation tutorial	Training	4		documentation done; need to get recorded
326	Investigate use of mag stripe readers for circ		4		
327	Investigate if a comma delimited file can be mapped and imported into Aleph item records (from MHS)		4		MHS has a stand-alone serials checkin system; would like to know if records can be imported into Aleph items; Clientele call 26135; not possible, tell MHS

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333	"Strip junk tags from a record before it is put into the Aleph Database. PALS correct records with OCLC-fix routine."	Cat	4		PALS now needs to know which tags to strip. Cataloging User Group needs to supply this information to the PALS office; PALS would also like to know what the negative impact is if the tags remain.
240	Revise Aleph Reporting Center documentation	ACQ/SER,CAT,CIRC, ILL,OPAC,SYSTEMS	5		To be decided once report group has finished their investigation
250	Investigate value-added services such as SFX, Metalib, etc.	Administrative,SYST EMS	5		
117	Test shared authority file processing	CAT, OPAC, SYSTEMS	5		This will include further testing on the deblinding feature for topical headings and names & geographic headings and automatic update of headings; version 18 at earliest
297	Report of bibliographic records without holdings records made available periodically to all libraries.	Cataloging	5	Medium	Clientele ticket number: 27472; Determined not available in ARC
238	Investigate adding photos to patron records	CIRC, SYSTEMS	5		how much space? What are implications for local pc?
210	Add direct title search to MnPALS	OPAC,SYSTEMS	5		Not in Aleph functionality; another Ex Libris customer has on their Web search page
214	Create Configuring Aleph tables tutorial	Training	5		
217	Create ISO ILL Tutorial	Training	5		
218	Job aid for ISO ILL procedures	Training	5		
219	Job aid for keyboarding tips	Training	5		
220	Job aids for circulation functions	Training	5		
196	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	5	High	
307	On brief display list use alternating background color or shading	WebOPAC	5	High	WebOPAC issues #22
328	Export MHS data to be sent to RLIN when MHS is ready to do so		5		Lydia Lucas is the contact; see Clientele call 26367; look at ticket

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334	open_window java function needs to be rewritten	WebOPAC	5		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. We have discovered that we need the IE toolbar to cut and paste from Netlibrary items that are in HTML. Checking other non-Aleph library catalogs, Netlibrary items show up in a new window with the toolbar. Is that something that
332	PALS will identify bib records that have another library password and the cataloger level	CAT		We do not have a timeframe established when we can get this work done.	To get the cataloger level back to a level where your catalogers can work on their OWN records will be a one-by-one record change of the CAT level. PALS cannot do a global change of that. Once we have identified any of your bib records that have been affected, we will send you information on how to change the CAT level.