

Completed project tasks

Task Number	Task Name	Functional Area	Staff Responsible	Priority	Completion Date	Notes	
1	Patron Load InterFace development	CIRC, SYSTEMS	Mike, Al, Deb, Larry	1		Needed for beta libraries and gamma libraries; in testing	
2	Oracle database reorganization to reset some parameters	SYSTEMS	Deb, Al, Mike, Rod	1	12/23/2003		
3	Production Load data review		Becky, support staff	1	2/24/2004	pending additional planning with Ex Libris	
4	Production data load report compiled for ExL		Becky	1	2/25/2004	pending additional planning with Ex Libris	
5	Test Aleph ILL functionality	ILL		Sonja, Susan, Mike, Al	2	High	Ongoing
6	Test ISO ILL between ALEPH and PALS	ILL	Sonja, Susan, Mike, Al	1	High	ongoing	
8	Test ISO ILL between VDX and PALS	ILL, GATEWAY	Sonja, Susan, Mike, Al	1	High	in process; bugs fixed as found	
9	Test ISO ILL between VDX and ALEPH	ILL	Sonja, Susan, Mike, Al	1		Duplicate of 7	
12	Build Aleph answerbook	Operations	Support staff	1		Moved to operations	
13	Gamma libraries STP		All	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	Deb, Mary Ann	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	
15	Test Course Reserves batch processing	COURSE RESERVES	Doris, Susan, Larry	1	Low	Test after installation of next version of software	

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16	Test Course Reserves save files accessibility.	COURSE RESERVES	Doris, Susan, Larry	1	Low	Setup issue
17	Backup oracle spaces on harp before merge begins	SYSTEMS	Deb, Larry	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	AI	1	2/23/2004	
20	Copy gamma libraries' Aleph tables and permissions from lute to harp	SYSTEMS	AI	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
21	Copy gamma libraries' Aleph permissions from lute to harp	SYSTEMS	AI	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	Doris	1		is this satisfactorily completed?
23	Extract Production data	SYSTEMS	Mike	1	2-Feb-04	Schedule was delayed by a week
24	Review top 10 list	Development	Becky	1	8-Mar-04	Reviewed; made sure open issues still on development list

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25	Review December 2002 development list	Development	Becky	1	8-Mar-04	Reviewed; made sure open issues still on development list
26	Shut off all cataloging for gamma libraries	SYSTEMS	Mike	1	22-Jan-04	Schedule was delayed by a week
30	Complete indexing following gamma STP	SYSTEMS	Al, Mike	1		Estimated time
31	Copy beta libraries bib file for downtime	SYSTEMS	Deb, Al,	1	23-Dec-03	
33	Test EDI with EBSCO for serial invoices	ACQ, SER, SYSTEMS	Dee, Deb	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	Mike, Al, Doris	1		
35	Update Aleph Migration Plan (re-arrange libraries that requested change)	Planning	Becky	1	3/22/2004	Currently in progress
36	In circ, test local check box performance fix	CIRC, SYSTEMS	Doris, Mike	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

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37	Update Clientele problems list and send to Ex Libris	Operations	Cathy	1			
38	Printing and Task Manager Training, Rochester	Training	Dan	1	20-Jan-04		
39	Tables Consultation, Rochester	Training	Becky	1	21-Jan-04		
40	Distribute 15.5.2 client to beta and gamma libraries	Operations	Dan	1	3-Feb-04		
41	Test delete functionality of p_cir_77 (patron architecture issue)	SYSTEMS	Mike, Al	1	Medium	In testing; will be in version 17; has been tested works in 17	
42	Development meetings (ILL)	Development		Becky, Mike, Sonja, Susan, Al	Jun-06	Medium	ILL meetings continue:
43	Upgrade Sun production server	SYSTEMS	Mike, Linda, Rod, Al	1		Equipment will be ordered mid-March; delivery and installation will be scheduled	
44	Proxy server development	SYSTEMS	Rod	1		Now in production at one library	
45	Proxy server documentation	SYSTEMS	Rod	1			
46	Proxy server implementation	SYSTEMS	Rod	1			
47	Proxy server initial support	Operations	Cathy, Dan	1			
50	Implement new version of VDX	Gateway	Larry, Susan	1	19-Mar-04		
51	Prepare and present Webinar training for new VDX features	Gateway	Susan	1	March 4-5, 2004		
52	Create VDX Groups for DocFind	Gateway	Larry	1	March 4-5, 2004	Will lessen impact on Gateway servers	
53	Input availability definitions in VDX	Gateway		1	Medium	Impact on Gateway servers provide information; FDI is	
54	Revise Aleph vocabulary list	Training	Dee	1			
55	Identify and discuss issues relating to cataloging for 2 year schools that are	CAT, SYSTEMS	Mary Ann, Mike, Becky, Sonja	3		This will be an ongoing process	
56	Load all authority updates since July	SYSTEMS	Deb	2			

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57	Union view benchmark testing; work to improve performance	SYSTEMS	Mike, Al	2	High		
58	Figure out how libraries will access their web pages for customization (OPAC and Course Reserves)	SYSTEMS	Perry, Becky, Rod, Al	3	High	duplicate of xxx	
60	Plan delta group migration	Planning	Becky, Tech staff, Support staff	2		Planning started with delta groups at Migration Preparation workshops on March 18 and March 25	
61	ILL Functional Training by Ex Libris (if needed)	Training	Sonja, Susan	2	High	Not needed	
62	Prepare ILL training for libraries	Training	Sonja	1	Feb-06	Training is underway; materials are available on the web	
63	Conduct ILL training for libraries	ILL		Sonja, Susan	24-May-06	May-06	
64	Configure 16.02 on test server	SYSTEMS	Mike, Al	2			
65	16.02 GUI Client training	Training	Training staff	2			
66	Determine best method for migrating rest of libraries	Planning	Becky, Mike	2		Have discussed with Ex Libris	
67	Respond to TdS & Pioneerland RFP	Planning	Linda, Becky, Mike	2			
69	Test new features in 16.02			2		These features are being tested with version 17 testing.	
70	a. Test ILL priority 2 enhancements	ILL					
72	Plan pre-migration workshops	Training	Training staff	2	26-Feb-04	Write goals and objectives for workshop; plan content	
73	Authentication doesn't work	CIRC, SYSTEMS	users; libraries	Al	2	Low	Problem reported to Ex Libris on Clientele ticket 22324; closed ticket because does work in 17; doesn't work in 15.5; Al to test

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74	15.5.2 installed on production server	SYSTEMS	Al, Mike	2	2/6/2004		
75	Schedule data merge planning meeting with Minnesota West	Planning	Becky	2			
76	MnLINK User Group meeting	Meetings	Support staff	2			
77	Delete beta libraries records	SYSTEMS	Mike	2	Nov-03		
80	Test EDI with Midwest for book orders	ACQ, SYSTEMS	how many?	Dee, Deb	2A	Medium	in progress
82	Test EDI with Blackwell for book orders	ACQ, SYSTEMS	a few	Dee, Deb	2B	Medium	in progress; for MSU; does this include Collection Manager?
84	Schedule/complete conversion process training	SYSTEMS	Becky, Tech staff	2			
85	Global changes in Aleph	SYSTEMS	Larry, Deb	2	Medium	On charges document	
86	Planning with delta group	Planning	Becky, support staff, tech staff	2		Duplicate of 60	
87	Identify libraries for delta group to replace Twin Cities 2 year campuses	Planning	Becky	2	17-Mar-04	CALCO libraries, St. Mary's, Southeach Technical College added	
89	Booking data conversion; specs and data review	Planning	ExL, PALS, beta, gamma libraries	2		Dependent on delivery of Booking software from Ex Libris and how many libraries using booking now will be converted; booking not anticipated before September, 2004 in version 16.03; won't be done	

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91	Test Marcive loader	SYSTEMS	Larry, Mary Ann	2		Following successful testing, provide load instructions for beta libraries; problem has been identified and reported to Ex Libris on Clientele ticket 20634	
92	Write procedure for loading Marcive records	CAT, SYSTEMS	Mary Ann, Larry	1			
93	Load Marcive files for beta libraries since July 2003	SYSTEMS	Larry	2	Medium	SCS completed; SBJ completed	
94	Load Marcive files for gamma libraries since January 2004	SYSTEMS	6 libraries use marcive	Deb	6C	Medium	Waiting for resolution from Ex Libris; loaded for GAC on lute; new (BIG) problem sent to ExL; management team decided that moving to version 17 was highest priority and therefore will delay resuming work on this until after 17 is available
95	Contract re-negotiation	Development	Becky	3		Date not yet determined	
96	Spring PALS Users Group prep/meeting	Meetings	all	3			
97	Remove gamma and delta library data from PALS	SYSTEMS		Mike	Jun-06	Medium	all libraries live on Aleph
98	Convert delta group records	SYSTEMS	Deb or new person	3			
99	Schedule Pre-migration workshops	Planning	Training staff, Trudy	3		Determine dates and locations; advertise workshops	
100	Test circulation overnight batch process	CIRC	Doris, Al, Mike	3		In process	
101	Test all acquisitions batch services	ACQ	Dee, Deb	3		In process	
102	Test all circulation batch services	CIRC	Doris	3		In process	

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103	Test all serials batch services	SER	Dee	3		In process	
104	Test all items batch services	CIRC	Doris, Mary Ann	3		In process	
105	Test MARC8 bibliographic extract (from Unicode to OCLC format)	SYSTEMS	Mike, Mary Ann	2	Low		
106	Test all cataloging batch services	CAT	Mary Ann	3			
107	Fiscal year rollover update for Aleph libraries	ACQ	Dee	2		Possibly via Webinar	
108	Conduct pre-migration planning workshop	Training	Training staff	3		Will offer workshop at regular intervals	
109	Extract delta group records	SYSTEMS	Mike	3			
111	Install 16.02 on production server (harp)	SYSTEMS	Al, Mike	3	3 days	Skipped V16 on ExL's recommendation	
112	Install 16.03 on test server; then test new features	SYSTEMS	Ex Libris	3		On March 9, 2004 learned that Ex Libris is not planning a 16.03 release; rather development will be in version 17	
113	Test new features in 16.03			3		learned that Ex Libris is not planning a	
114	a. Inventory	CIRC	Doris			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	Dee			On March 9, 2004 learned that Ex Libris is not planning a 16.03 release; rather development will be in version 17	

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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
118	Test revised indexing and determine needed changes	CAT, OPAC	Mary Ann, Perry, Cathy, Mike	3		Goal is to work with MnPALS libraries and identify changes needed prior to delta group stp
120	Test booking functionality	Development	Sonja, Mike	1	High	Expect testing to be iterative
121	Booking Functional Training provided by Ex Libris	Development	Support staff	4	High	Do we want?
125	Test OCLC overlay	CAT	Mary Ann/Larry	4	Low	Resolved with 945 match field
126	Open delta libraries on lute	SYSTEMS	AI	4		
128	Install version 16.3 on production server	SYSTEMS	AI, Mike	4		Version cancelled by Ex Libris; next version will be 17
129	Site visits to delta group libraries	Planning	Support staff	4		
130	Schedule training calendar for delta group libraries	Planning	Becky, Cathy	4		
133	Test spine label printing; write procedure	SYSTEMS, CAT	Dan, Mary Ann	1		Ask LaSSSI group; couple of sites have written spine label program; almost completed
135	NAAUG in Boston	Meetings	Dee, Cathy, AI, Mike, Becky	5		Moved to operations
136	Review of STP process with gamma libraries	Planning	All	5		
137	Evaluation of implementation process	Planning	Management team	5		
139	Submit final list of Post STP issues		Libraries	5		to Ex Libris
140	Determine any additional support needs		Libraries	5		work with PALS

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142	Format limiting (tab_type_config)	OPAC, SYSTEMS	?	Perry, Mary Ann, Al	4A	High	Indexing & Access task forces need to provide input. WebOPAC issues #72; could be more than one; new ones in place; order may be changed
143	Keyword and browse options merged into one drop down menu on the basic search page	OPAC, SYSTEMS	Perry, Mary Ann, Cathy, Mike	1			
144	Improving retrieval limit options	OPAC, SYSTEMS	Perry, Mary Ann, Cathy, Mike	2		will be in version 17	
146	Call number of full record	OPAC, SYSTEMS	Perry, Mary Ann, Cathy, Mike	1			
147	Boolean operators available on advanced search page	OPAC, SYSTEMS	Perry, Mary Ann, Cathy, Mike	2			
148	advanced search page	SYSTEMS	Cathy, Mike	2			
150	Prepare to instruct Library staff in use of Web OPAC	Training, OPAC	Perry, Susan	2			
151	Create Web-based tutorial for Changing Fiscal Years	Training, ACQ	Dee, Kyle	1			
152	Review and revise server policies in preparation of firewall	SYSTEMS, Security	Rod, Al, Mike, Dan, Paul, Gary	1			
153	Document server weekend on-call procedures	SYSTEMS, Security	Rod, Al, Mike, Dan, Paul, Deb	1	High		
154	Plan installation of firewall	SYSTEMS, Security	Rod, Al, Mike, Dan, Paul, Gary	1			
155	Install firewall	SYSTEMS, Security	Rod, Al, Mike, Dan, Paul, Gary	1			
156	Test server connections through firewall	SYSTEMS, Security	Rod, Al, Mike, Dan, Paul, Gary	1			
157	Update PALS staff regarding firewall changes	SYSTEMS, Security	Rod, Al, Mike, Dan, Paul, Gary	1			

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158	Load netlibrary records	CATALOGING, OPAC, SYSTEMS	Larry, Mary Ann	3			
159	Coordinate ISO ILL testing between Pioneerland and Plum Creek	ILL, GATEWAY	Susan, Sonja, Mike, Larry	3	Medium		
160	Document Aleph ISO ILL problems detected during testing	ILL	Sonja, Mike, Al	1	High	Included in line 5	
161	Re-test Aleph ILL following delivery of server packs	ILL	Sonja, Mike, Al	1	High	Included in line 5	
162	Plan installation of VDX 2.6.1	Gateway	Susan, Larry	2			
163	Install VDX 2.6.1	Gateway	Larry	2			
164	Test installation of VDX 2.6.1 before going into production	Gateway	Susan, Larry	3			
165	Document problems found in VDX 2.6.1 and send to vendor	Gateway	Susan, Larry	3			
166	Retest fixed problems found in VDX 2.6.1	Gateway	Susan, Larry	3			
167	Prepare training materials for new functionality of VDX 2.6.1	Gateway	Susan	3			
168	Train users on new functionality of VDX 2.6.1	Gateway	Susan	3			
169	Put VDX 2.6.1 into production	Gateway	Susan, Larry	3			
170	Plan installation of ZPORTAL 3.0	Gateway	Susan	5			
171	Install ZPORTAL 3.0	Gateway	Susan, Larry	5			
172	Test installation of ZPORTAL 3.0 before going into production	Gateway	Susan, Larry	5			
173	Document problems found in ZPORTAL 3.0 and send to vendor	Gateway	Susan, Larry	5			
174	Retest fixed problems found in ZPORTAL 3.0	Gateway	Susan, Larry	5			
175	Train users on new functionality of ZPORTAL 3.0	Gateway	Susan, Larry	5			
176	Put ZPORTAL 3.0 into production	Gateway	Susan, Larry	4	20-Jan-05		
177	Plan installation of VDX 2.7	Gateway	Susan, Larry	5			
178	Install VDX 2.7	Gateway	Susan, Larry	5			
179	Test installation of VDX 2.7 before going into production	Gateway	Susan, Larry	5			

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180	Document problems found in VDX 2.7 and send to vendor	Gateway	Susan, Larry	5			
181	Retest fixed problems found in VDX 2.7	Gateway	Susan, Larry	5			
182	Prepare training materials for new functionality of VDX 2.7	Gateway	Susan, Larry	5			
183	Train users on new functionality of VDX 2.7	Gateway	Susan, Larry	5			
184	Put VDX 2.7 into production	Gateway	Susan, Larry	5			
185	Review call tracking software's customer service interface	Planning	Cathy, Kyle	5			
186	Plan Epsilon group migration	Planning	Becky, Tech	1		In progress	
187	Plan Zeta group migration	Planning	Becky, Tech staff, Support staff	1		In progress	
188	Plan Eta group migration	Planning	Becky, Tech staff, Support staff	2			
189	Schedule training calendar for epsilon group libraries	Planning	Becky, Cathy	3			
190	Schedule training calendar for zeta group libraries	Planning	Becky, Cathy	3			
191	Schedule training calendar for eta group libraries	Planning	Becky, Cathy	2		in progress	
192	Post production site visits to gamma libraries						
195	Study and learn serials module, 15.5.2 and beyond	ACQ/SER					
198	Write program for inventory collection and transfer to Aleph (for Percon units)	SYSTEMS		AI	3		
199	Install disk storage unit	SYSTEMS	Rod,	1			
200	Re-allocate disk allocations for lute and harp	SYSTEMS	Rod, AI	1			
201	Conference calls with delta libraries	Planning	Becky	1			
203	Write PRB for item-04 problem	SYSTEMS	Becky	2			
204	Create Intro to Aleph web tutorial	Training, SYSTEMS	Becky, Kyle	5			
205	Test PDA access with Aleph	OPAC, SYSTEMS	Cathy, Susan, Dan, Paul	4			

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206	Write PRB about cash-09 problem	SYSTEMS	Doris, Al	1			
208	Write job description for student worker	Administrative	Becky	2			
209	Plan for version 17 install with Ex Libris	Planning	Becky,Cathy,Deb	4			
211	Update Delta Library Group migration plan	Planning	Becky	1			
212	Create Advanced Web OPAC tutorial	Training	Perry	3		done via webmeeting; will consider later for version 17 and beyond	
215	Create Spine Labeling tutorial	Training	Mary Ann,Dan	4			
216	Create EDI Invoicing Tutorial	Training	Dee	4		Did webmeeting with libraries	
221	Review acceptance testing scripts	Planning	Support staff	1		In progress	
222	Test using acceptance testing scripts practicing with version 17	Planning	Support staff	1		in progress	
223	Install service pack that includes marcive loader	Planning	Al	1			
224	Configure new help desk software	Planning	Cathy,Kyle,Susan	1		Waiting for data	
225	Put new help desk software into production	Planning	Support staff	1	Oct-05		
226	Review Ex Libris version 17 training materials	Planning	Support staff	2		there aren't any	
227	Customize version 17 training materials	ACQ/SER,CAT, CIRC,ILL,OPAC,	Support staff	3		really don't have any	
228	Define Aleph buddy concept	Planning	Becky	1			
229	Conduct Migration Workshop in Duluth	Training	Becky	1			
230	Conduct Migration Workshop in Moorhead	Training	Becky	1			
231	Conduct Migration Workshop in Twin Cities	Training	Becky	2		Two sessions scheduled in August	
232	Test ISO ILL between Aleph servers	ILL		Sonja	A	High	Working with Minitex and U of Mn; testing as can, have needed fixes from ExL

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235	Prepare advanced systems training	SYSTEMS	Dan,Becky	4		Completed		
236	Perform acceptance testing for version 17	ACQ/SER,CAT, CIRC,ILL,OPAC, SYSTEMS	Support staff	1		ILL, Arc, Booking; have tested ILL & Booking so far		
243	Track acceptance testing problems	Administrative			Becky,Sonja	Jun-06		
245	Plan for workflow changes due to new version	ACQ/SER,CAT, CIRC,ILL,OPAC,	Support staff	2				
247	Create area on lute for test install of version 17	SYSTEMS	AI	1				
248	Copy beta and gamma production data and tables to version 17 test area	SYSTEMS	AI	1				
249	Write definition of a quality software installation	Administrative	Linda,Becky,Cathy, Mike, Deb	1				
252	Prepare training materials for ZPORTAL 3.0	Gateway	Susan, Larry	5				
253	Investigate access to version 16 by Aleph libraries	SYSTEMS	Becky,Dan	2	18-Feb-05	Not feasible since V 17 is installed		
254	Put any documentation about version 16 on Aleph secure page	SYSTEMS	Becky,Perry	2				
255	Review best practice for distributing documentation to migrating libraries (CD, rely on Web?)	Planning	Becky,Cathy	4				
256	Determine content of advanced systems training	Planning	Dan,Becky	3		done		
257	LibProxy with SFX development	SYSTEMS	Rod	4				
258	Create slice on disk for version 16/17 install	SYSTEMS	AI, Rod	1				
259	Create slice on new disk for copy of 15.5 data	SYSTEMS	AI, Rod	1				
260	Validation tables updated	CAT			Mary Ann, Deb	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			Mary Ann, AI	2		tags validated in OCLC being removed; will take care of 85% of problems
266	(tab33.eng)	CAT,SYSTEMS	Mary Ann, AI	1				

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267	Establish Indexing Task Force	CAT	Mary Ann	2		In consultation with DBQMTF/Cat User Group	
268	Activate authority study group	CAT	Mary Ann	2	First meeting April 18 or 19, 2005	In consultation with DBQMTF/Cat User Group	
269	Ask for volunteers for validation study	CAT	Mary Ann	1		In consultation with	
269	Add new word index WCI	CAT	AI		2 days	Needs to be done by 10/2005	
270	856 display in WebOPAC (subfield y)	CAT,SYSTEMS	Mary Ann,AI	3		operational, but brings up a pop-up box in 15; works in 17	
270	New "find" index, series work	Web OPAC	AI		hours	Needs to be done by 10/2005	
271	856 hyperlink in holdings display	CAT,SYSTEMS	Mary Ann,Larry	3		completed	
272	Establish mechanism to track & report authority display and functionality issues	CAT	Mary Ann	4		Group is doing it	
273	Create online form to submit ideas (accepted, rejected status)	CAT	Mary Ann	4		Is this for indexing and authorities? Groups are designing	
275	Content validation for unique identifiers (don't want validation on content--DBQMTF)	CAT		1			
277	Library statistics for Aleph libraries	Planning,SYSTEMS	Becky,Larry,Deb,AI	2			
279	Plan/write statement explaining OPAC views	OPAC	Perry	3		Why union view instead of other library's server? Will change with version 17	
282	Web OPAC Customization for individual libraries	OPAC/SYSTEMS	Perry,AI	3	Medium	duplicate of xxx	
284	Arrange for testing SYS60 pattern templates before removing them	CAT,SER	Mary Ann,Dee	1	High	will work on in Version 17	
285	Identify duplicate usernames	SYSTEMS	Dan,AI	1	3/23/2005	Needs to go to libraries	

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286	Write procedure for eliminating duplicate usernames	SYSTEMS	Dan	1		review procedure, then send	
287	Prepare area for Aleph Reporting Center on server	SYSTEMS		1		waiting for additional disk	
289	Add location, call number, and status display when using the Hooks to Holdings feature in BIP	SYSTEMS	AI	5		only handle MARC records, we return opac record; can't be done	
290	Keep VDX/ZPORTAL training materials current as long as we have GW responsibility	Gateway	Susan	3			
293	Investigate import of OCLC records using CatExpress	Cataloging		Mary Ann	2		Will need to know by Eta group--Rush City and MSB
294	Development for WebPALS--mask institution symbols	Cataloging	Mike	4	3/23/2005	Clientele ticket #27531	
297	Report of bibliographic records without holdings records made available periodically to all libraries.	Cataloging	?	Management Team	5A	Medium	Clientele ticket number: 27472; Determined not available in ARC
298	Implement course reserves save files for faculty	CR	Perry, Mary Ann	2		Perry follow up with Mary Ann	
302	Add Aleph system number to drop down menu in advance browse search	WebOPAC	Perry	1	Medium	WebOPAC issues #68	
304	Change text on search and browse option screen to "find other records" in the catalog	WebOPAC	Perry	1	Low	WebOPAC issues #74	
306	Display of 856 subfields in OPAC	WebOPAC	Perry	2	Medium	WebOPAC issues	
308	Search terms listed in drop down box on basic search page be revised and rearranged	WebOPAC	Perry	2	High	WebOPAC issues #32	
309	Only display valid ISSN and ISBN numbers in public webopac	WebOPAC	Perry	2	Medium	WebOPAC issues #85, Invalid numbers will display in MARC tag view; little fix, AI will do or has done	
311	Add TdS to Gateway	Gateway	Larry	1			
314	Add configuration to e-mail failed IPIG requests from Zportal to PALS ILL staff email address	ILL	ILL staff		Jul-06		no longer needed

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316	Configure harp for ILL	ILL	Al, Sonja	1	Nov-05	in progress	
317	ISO setup on PALS and Aleph for interoperability	ILL	consortium	Mike, Sonja	1	High	
318	Set up 555 region for conversions	Systems	Al	1			
319	Set up 575 region for conversions	Systems	Al	1			
320	Set up 525 region on lute for conversions	Systems	Al	1			
321	Set up harp for epsilon/zeta group	Systems	Al	1			
322	Set up harp for eta group	Systems	Al	1	April, 2006	Apr-06	in progress
323	Set up tables for reindexing	Systems	Al	1			
324	Collection maps for eta group	Support	Cathy	1		Waiting for one	
330	Help Window for 853X in SYS60	Cataloging	Catalogers & serials staff	Mary Ann	4B		The help in this window should be expanded; sent to Bobby Bothman; HOW IS THIS DISPLAYED IN VERSION 17?
335	Service to identify unlinked holdings and items	Reports	consortium	Mary Ann & Tech Staff	5A		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.
C	Report problems to Ex Libris	all	1				
D	Track problems reported to Ex Libris via	Cathy	1				
F	Track problems reported to Ex Libris via	Deb	1				
G	Provide answers to PALS support calls	support staff	1				
P	Project calls with Ex Libris	Becky, Mike, Deb	1				
Q	Project calls with libraries	Becky, Mike, Cathy, support staff	1				
R	Support VDX	Susan, Sonja	1				
W	Build Aleph answerbook	Support staff	1				
	Run URL checker	Operations/Support	consortium		1A		Scheduled batch job? Or Aleph service?

Completed project tasks

Task Number	Task Name	Functional Area	Staff Responsible	Priority	Completion Date	Notes	
251	What to do wiith authorities planning	CAT,SYSTEMS	consortium	Managem ent Team	2B		Possible version 18 issue
327	Investigate if a comma delimited file can be mapped and imported into Aleph item records (from MHS)		one library		5A	15-Nov-06	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; Mary Ann sent email to MHS
340	Version 17: Update tables via Upgrade Express	Upgrade	consortium		1B	15-Nov-06	
354	Edit inventory procedure document	Inventory	consortium	Dan	1C	15-Nov-06	
295	Proxy server enhancement--off-campus access to netLibrary records	Proxy Server	proxy libraries	Rod, Dan, Mary Ann	2A	15-Nov-06	
345	Implement interface with Blackwell Collection Manager	ACQ	a few libraries	Dee,Deb	2A	15-Nov-06	will work on as time allows
238	Investigate adding photos to patron records (merged with 381)	CIRC, SYSTEMS	Circulation staff	Susan, Becky, Al	4B	15-Nov-06	how much space? What are implications for local pc?
48	Version 17: Training preparation for new version 17 client	Training	consortium	Training staff	1B	15-Nov-06	To be determined
88	Version 17: Distribute new 17 GUI client	SYSTEMS	consortium	Dan	1B	15-Nov-06	Date to be determined
79	Test EDI with B&T for book and entertainment orders	ACQ, SYSTEMS	how many acq users?	Dee, Deb	3A	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	how many acq users?	Dee,Deb	4A		
124	Version 17: Test functionality of OWN control	CAT, SYSTEMS	consortium		1B	Low	Changes in version 17 Request sent to Ex Libris; action determined after we get an answer
131	Version 17: Profile maintenance at ADM rather than SYS in version 17	Development	consortium	Susan, Al,	1B		

Completed project tasks

Task Number	Task Name	Functional Area	Staff Responsible	Priority	Completion Date	Notes
193	Version 17: Prepare documentation (perhaps Web based training) for GUI client, plus revise Aleph Vocabulary	Training	consortium	Support staff	1B	To be determined
242	Version 17: Re-train all libraries on version 17	Training	consortium	Support staff	1B	in progress
325	Version 17: URL report via p-print-08	Cataloging	consortium	Mary Ann, AI	1B	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.
336	Version 17: Plan implementation	Planning	consortium	Becky	1B	
342	Version 17: Complete project plan	Upgrade	consortium		1B	
366	Version 17: Implement Circulation Log	Upgrade	consortium		1B	
386	Version 16: Implement new client Task Manager	Upgrade	consortium		1B	
389	Version 16: Implement GuiSys.ini	Upgrade	consoritum	Dan	1B	
300	Version 17: Explore sort options in WebOPAC	WebOPAC	consortium	Perry	1D	High WebOPAC issues #27; will implement in version 17 SBJ sent recommendation; will be made available for libraries' evaluation; January MATF meeting UPDATED? WebOPAC issues #26; Plan to have done by 2006 Spring Users Group
276	Add note to logon screen explaining what the password is	OPAC	consortium	Perry	1E	
299	Change revise and filter links to modify and limit	WebOPAC	consortium	Perry	1E	Medium/April UG WebOPAC issues #30, range searching is now working on version 15.5
301	Advance search page year limit: provide an example showing range of dates	WebOPAC	consortium	Perry	1E	
303	Version 17: Add option to sort results by date, author, title	WebOPAC	consortium	Perry	1E	Medium WebOPAC issues #69
305	Recommend placing call number prefix after the words call number	WebOPAC	consortium	Perry	1E	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

Completed project tasks

Task Number	Task Name	Functional Area	Staff Responsible	Priority	Completion Date	Notes
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	consortium	Perry	1E	Web OPAC 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 it would be too labor-intensive to implement in v. 15; due to single search box would need to create as java script and would be lots of work for each find-include-filter-file
383	Version 17: Test all options in Update Patron Records (cir-77)	Upgrade	consortium	Al, Susan	2A	Can delete button be deactivated?
385	Retrieve Record Keys (manage-70)	Upgrade	consortium		2A	
388	Version 16: Implement XSL Editor	Upgrade	consortium	Dan	2A	
310	Change links in header (basic, advanced command)	WebOPAC	consortium	Perry	3A	Medium WebOPAC issues #88; partially implemented on lute, still some work to do, to change needs to change 2 header files per library
381	Version 17: Investigate impact of loading patron photos merged with 210)	Upgrade	consortium		3A	Decided not to do this Does the cost of doing the training outweigh the benefits? Should there be different interfaces beyond branding? Does the strategic planning figure in? No other consortium is not allowing this; would be expensive
233	Post-version 17: Create class and Conduct HTML customization training	OPAC,SYSTEM S	libraries willing to take on task consortium? Especially those who don't use a digital management system already	Perry	4A	High
312	Version 17: Aleph Digital Assets Module thumbnails? (same as 384)	Cataloging	Mary Ann, Al		4A	version 17; work with MSU, Mankato Daardi Sizemore

Completed project tasks

Task Number	Task Name	Functional Area	Staff Responsible	Priority	Completion Date	Notes
357	Inquire about ARC version available ability	?	?	Becky	4A	Discussion started with Dave Stout; notified me that rep would change early in 2007
337	Develop and test a new service for all libraries that may be run from within the Circulation module that will produce a report that lists checkout statistics by collection code	CIRC, SYSTEMS	Consortium	Susan, Luda	4B	RN 060501-000040
350	Develop and test a new service for all libraries that may be run from within the Circulation module that will produce a report that lists all blocks that a particular patron ID has, to be able to identify from what library a global block is being propagated when p_cir_77 is run	CIRC, SYSTEMS	Consortium	Susan, Luda	4B	RN Answer Book 3030; patron can now see in My Account, so this isn't needed Need to check with Dennis to find out if this will still need to be done since RLIN has been purchased by OCLC
328	Export MHS data to be sent to RLIN when MHS is ready to do so		one library	Mary Ann	5D	

Completed project tasks

Task Number	Task Name	Functional Area	Staff Responsible	Priority	Completion Date	Notes
348	“Strip junk tags from a record before it is put into the Aleph Database. PALS correct records with OCLC-fix routine.”	Cat	?--are these fields already indexed? Why do they need to be removed?	Mary Ann, Deb	5B	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; From the Fall 2006 user group notes: Mary Ann Greenwald asked if the group wants to remove all 938 tags from the bib. record. Bobby Bothmann (MSU/Mankato) mentioned that the 938 tag includes vendor data, and could be useful in the future if libraries decide to use services like PromptCat that use that vendor information. Bobby Bothmann (MSU/Mankato) moved to not strip the 938 tags from the bib record; Adam Marsnik (NDC) 2nd.
339	Version 17: Convert data via Upgrade Express	Upgrade	consortium		1B	
358	Version 17: Add OWN code to holdings records	Upgrade	consortium		1B	probably during delta
361	Version 17: Implement Filtering Available Items	Upgrade	consortium	Perry	2A	
341	Version 17: HTML customization	Upgrade	consortium	Perry, Mike	1B	Extremely high

Completed project tasks

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CAT	Catalogers	Mary Ann, Deb	5A	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.	completed 3/23/07	
127	Version 17: Test summary holdings display in OPAC	CAT, OPAC, SER, SYSTEMS	consortium	Mike, Mary Ann, Perry, Dee, Deb	2A	Medium	
149	Update PALS home page	SYSTEMS	consortium	Perry, Linda, Michele, Trudy, Rod, Kyle	1B		Contracted to Web developer; in progress
413	Solaris 10 training for tech staff						
412	Investigate and Configure new Z39.50 targets				2C		

Completed project tasks

Task Number	Task Name	Functional Area	Staff Responsible	Priority	Completion Date	Notes
207	Write API for cash transactions transfer merge (with number 110)	SYSTEMS	MnSCU libraries; others if local business office can handle format	AI	4A	started; on hold
346	Track OPAC issues as liaison to MATF MOVE TO OPERATIONS; make more generic	OPAC	MATF	Perry	4A	
393	Test download of data from EBSCOHost with ILL	ILL	all libraries	Sonja, Mike	2B	
387	Version 16: Implement Identification of a Workstation	Upgrade	consortium	Dan, AI	2A	Tested; MnPALS is using IP addresses instead of workstation id
382	Version 17: Test Retrieve Record Keys (manage-70)	Upgrade	consortium	support	3A	Tested; result is list of doc numbers; haven't identified applicability for libraries
417	Test import of EbscoHost data into ILL forms	ILL	all libraries	Sonja	2A	SMSU helped with testing
398	Version 17: Test collection manager	ACQ	some	Dee, Deb	2B	
399	Existing EDI setups working in version 17	ACQ	some	Dee, Deb	2A	