Aleph Implementation Update

For the
MnSCU/PALS Users Groups
March 21-22, 2002
Topics

- Current activities
- Project plan
- Migration plan
- Aleph system structure
- MnSCU server settings
- Local settings
- Somewhere between server and local settings
- Workstation customization
Current activities

- Completed functional training in late February
- Working on data mapping with Ex Libris
- Working on project plan with Ex Libris
- Trainers are learning as they prepare job aids and supplemental training materials
- Technical staff are establishing backup and recovery procedures
Current activities, continued

• Upcoming meetings
  – Beta libraries, April 2
  – ILL development meeting, April 15
  – Booking development meeting, April 16
  – Implementation Advisory Group (not yet scheduled, but needs to happen soon)
Project plan

• Projected milestones
  – Data conversion in multiple iterations
    • Each iteration includes
      – Extract data (MnSCU/PALS)
      – Convert data (Ex Libris)
      – Load and index converted data (Ex Libris)
      – Analyze the converted data, report problems (MnSCU/PALS)
      – Reprogram, if necessary (Ex Libris)
      – Repeat as needed until data conversion accepted
• Phase 1 data migration
  – All TST records first (bib, item, patron, etc.)
  – Target date for preliminary conversion acceptance April 29
  – All IHC records second
  – Target date for final conversion acceptance May 21
    » Note: Dates have not yet been finalized between Ex Libris and us and may change

• Phase 2 data migration
  – MSL (all records)
  – SCS (subset)
  – SJU/CSB (subset)
– Target date for completion of 1st iteration July 22
– Target date for completion of 2nd iteration August 26
– Target date for completion of test full load October 21
– Target date for completion of production load December 14

» Note: Dates have not yet been finalized between Ex Libris and us and may change

• Concurrent with Phase 1 and 2
  – Extract entire bibliographic database (MnSCU/PALS)
  – Convert bib records (Ex Libris)
  – Load and index on production server (Ex Libris)
  – Extract LC Authorities (MnSCU/PALS)
Project plan, continued

– Convert data (Ex Libris)
– Load and index on production server (Ex Libris)
– Test bib-aut match program (MnSCU/PALS & Ex Libris)
  • Target completion date May 24
    » Note: Dates have not yet been finalized between Ex Libris and us and may change

– Pre-conversion training
  • 7 half day sessions (OPAC, Systems, Cataloging, Acquisitions, Serials, Circulation, Course Reserves)
    – Beta libraries
  – Implementation Advisory Group
  • Target completion date May 9
    » Note: Dates have not yet been finalized with beta libraries or Implementation Advisory Group and may change
• Begin analysis of converted data on May 15
• Complete analysis of converted data on May 21, with report to Ex Libris
  » Note: Dates have not yet been finalized between Ex Libris and us and may change

– Functional training for beta libraries
  • Will work with libraries to define dates
  • Need to build in time for those trained to complete training of colleagues at home library
Project plan, continued

- Switch To Production (STP) estimated dates
  - for MSL, December 2
  - for SCS, December 9
  - for SJU/CSB, December 16

  » Note: Dates have not yet been finalized between Ex Libris and us and may change

- Begin working with gamma group
  • Date to be determined
  • STP to be determined
Other tasks to accomplish before STP

- Test multi-ADM environment
- Learn how to set up printing capabilities and test
- Test ILL functionality
- Test Patron Load InterFace (PLIF)
- Test OCLC interface
- Test EDI functionality
- Functional training update for 15.2 for MnSCU/PALS staff
- Acceptance testing
- And other pieces we’re still discovering
Migration plan

- Posted on the MnSCU/PALS home page at http://www.pals.msus.edu/pals/ under Aleph Implementation
- Dates are approximations
- Anticipated plan
  - Meet with each group approximately two months before their migration year begins to explain process in detail
Migration plan, continued

- Determine STP dates for each library
  - Expect different date for each library
- Discuss recommendations for clean-up activities before conversion begins
  - Migration Tips and Recommendations document on http://www.pals.msus.edu/pals (click on Aleph Implementation)
- Plan conversions based on STP dates
- Plan training dates based on STP dates
- Schedule training classes
- Follow same general outline as described in project plan for conversion and training
Migration, continued

- Keep communication flowing about status of migration
- As situations change, the migration schedule may need to be revised
• To meet the needs of our consortium, Aleph system structure is unique
• The MnSCU server configuration is different from the University of Minnesota
• Software version will be different initially; the MnSCU server is implementing 15.2 and the University of Minnesota is implementing 14.2
### Aleph System Structure, continued

<table>
<thead>
<tr>
<th>Type of Library</th>
<th>Number Identifier</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIB—Bibliographic</td>
<td>01-09</td>
<td>Contains bibliographic records</td>
</tr>
<tr>
<td>AUT—Authority</td>
<td>10-19</td>
<td>Contains authority records of preferred forms of headings, relationships between headings</td>
</tr>
<tr>
<td>ILL—Inter-Library Loan</td>
<td>20-29</td>
<td>Contains copies of the bibliographic records that are being requested</td>
</tr>
<tr>
<td>CRD—Course Reading</td>
<td>30-39</td>
<td>Contains course reading records</td>
</tr>
<tr>
<td>ADM—Administrative</td>
<td>50-59</td>
<td>Contains data about acquisitions, circulation, serials &amp; users</td>
</tr>
<tr>
<td>HOL—Holdings</td>
<td>60-69</td>
<td>Contains summary holdings information</td>
</tr>
</tbody>
</table>
Aleph system structure, continued
Aleph system structure, continued

- Shared libraries (databases)
  - BIB01, the bibliographic library
  - AUT10, the authorities library
    - May have AUT11 for local authorities
  - HOL60, the holdings library (Ex Libris is investigating if HOL library can be within each library’s directory)
  - ALEPHE which contains global settings tables that apply to above libraries
  - SYS50 which contains all patron records and vendor records
• Individual libraries (databases)
  – St. Cloud State University
    • SCS20, the ILL library
    • SCS30, the course reserves library
    • SCS50, the administrative library
    • SCSPW, the privileges/password library
    • ALEPHE, global settings for SCS
  – St. John’s University/College of St. Benedict
    • SBJ20, the ILL library
Aleph system structure, continued

- SBJ30, the course reserve library
- SBJ50, the administrative library
- SBJPW, the privileges/password library
- ALEPHE, global settings for SBJ

– Minnesota State Law Library
  - MSL20, the ILL library
  - MSL30, the course reserves library
  - MSL50, the administrative library
  - MSLPW, the privileges/password library
  - ALEPHE, global settings for MSL
MnSCU server settings

- Shared libraries equal shared settings
  - BIB01
    - One indexing table (tab11)
    - One codes and names for indexes table (tab00.eng)
    - One initial non-filing words and articles table (tab02)
    - One filing routine table (tab_filing)
    - One word breaking procedures table (tab_word_breaking)
MnSCU server settings, cont.

- One expand program (merging BIB and ADM fields for display and indexing) table (tab_expand)
  - And many more
  - AUT10
    - One indexing table (tab11)
    - One set of rules for matching BIB and AUT records (tab20)
    - One table for creating broader terms, narrower terms, and related term links (tab07)
  - Alephe
    - One table for importing OCLC records
MnSCU server settings, cont.

- One table to define the clients allowed to access the server
- One table to define external Z39.50 gateway connections
  - SYS50
    - All patron records
    - All vendor records
- Some of these tables will need input from Implementation Advisory Team, for example, the indexing table
Local settings

- Individual libraries control their own settings
  - XXX30, course reserves
    - Currently is web-based, so no server tables apply
    - Mail server name (set in client)
    - Library’s e-mail address for reserves desk (set in client)
  - XXX50 and alephe
    - Global settings (tab10)
    - Item reshelving time (tab14)
    - Item statuses (tab15.eng)
    - Borrower statuses (tab31)
Local settings, continued

• Due dates, fines and limits on borrowing (tab16)
• Library open hours (tab17)
• Overdue notices (tab32)
• Setup for the self-check barcode reader (tab_sc)
• Forms and letters (various tables and templates)
• And many others
  – XXXPW
    • Authorizations and passwords
  – XXX20, ILL
    • Not yet known
Some tables need to be the same across all administrative libraries
  – Implementation Advisory Group will provide input for these tables
    • Defines data that displays
    • Defines catalog search options within modules

HTML customization
  – Files will be in each administrative library
  – Frameless and uses Cascading Style Sheets
  – Libraries can choose to customize
– Or, libraries can use a MnSCU set of www files that can be copied into its administrative record
  • The MnSCU/PALS staff can define a generic set of pages, or
  • A small work group whose members have a good design sense could define how the pages will look
  • Implementation Advisory Group will be charged with this task; if you’re interested in serving on this task force contact one of the members or alternates and express your interest
Workstation settings

- Plan to distribute GUI software on CD initially
- Plan to have as many options pre-set as we can
- Each workstation will still have some setup
  - Browser path
  - Mail server
  - E-mail address for library
– Holds handling
– Tools available on workstation, for example, a text editor, e-mail program, browser
– And more...

• Systems training will point out these pieces
Conclusion

• Closing comments
  – Migration is partnership between our office and libraries
  – As libraries migrate, can learn from other’s experiences
• Questions?