Aleph Migration Update

PALS Users Groups
December 7, 2001
Topics

✔ What’s happened since spring user group meetings
✔ Migration and training plan
✔ What we learned during Aleph training
✔ Upcoming Aleph training
✔ Implementation Advisory Group
✔ What’s next
What’s happened

✔ April
  – Contract between Ex Libris and HESO signed
✔ May
  – Aleph pre-Kickoff Meeting held on May 31
✔ June
  – North American Aleph Users Group held June 3-5 in Montreal
  – Meetings with Ex Libris regarding contract development issues held on June 5-6
What’s happened

– Meeting with beta libraries on July 6

✔ July

– Second development meeting with Ex Libris held on July 18-19
– Migration Kickoff meeting with Marlene Harris, Ex Libris project manager, on July 20
– Began *The M-Files: Implementation News*, an electronic newsletter
What’s happened

- Price Waterhouse Coopers risk and relationships assessment begins
- Contract between MnSCU and MHESO written for server purchase

✔ August
- Equipment list reviewed with Sun
- MnLINK Policy Advisory council met on August 8
What’s happened

- Migration planning questionnaire distributed to MnSCU/PALS libraries
- Amendments to contract between MnSCU and MHESO written for additional implementation costs

✔ September
- Sun servers ordered
- Training room equipment ordered and received
What’s happened

- Sun servers received
- Price Waterhouse Coopers risk and relationship assessment concludes
- MnLINK Policy Advisory Council met on September 28

✔ October
- AFSCME/MAPE strike begins on October 1st and continues through October 12
What’s happened

- MnLINK ILS Operations Committee met on October 1
- Debbie Cheesman assigned as new Ex Libris project manager
- Questionnaire results compiled and analyzed
- Draft migration schedule written
- Draft library training plan written
- Ex Libris Aleph training rescheduled for second time
What’s happened

- Aleph software installed on both servers by late October
- Second meeting with beta libraries on October 30

✔ November
- MnLINK ILS Operations Committee met on November 5
- Revised migration plan and new training plan sent to libraries
What’s happened

– Aleph System Librarians training held on November 15-16
– Conference call with beta libraries on November 20
– Project planning meeting with Ex Libris on November 26
– Aleph Systems Analysis/Data Conversion sessions held on November 27-28
– Aleph Web OPAC and GUI OPAC training held on November 29 and 30
What’s happened

✔ December

- Aleph Circulation Pre-Conversion training held on December 3
- Aleph Acquisitions Pre-Conversion training held on December 4
Draft migration and training plan

✔ Draft migration plan
  - Based on responses to migration questionnaire
  - Created a first draft based on libraries first choice of date
  - Identified whether date, location or group was more important to each library and applied those changes to the first draft; also expanded to using any of date choices
  - Identified potential training locations
Draft migration and training plan

✔ Draft training plan

- Regional classes planned
- Flexible schedule with multiple starting dates and classes
- Plan assumes an average of six months for migration; may be more or less depending on which PALS subsystems are currently used
What we learned

✔ Aleph structure
  – Oracle level--where data resides
  – Aleph level--defines ‘libraries’
  – PC client level--provides staff access to Aleph
  – Web browser level--provides public access to Aleph

✔ Aleph libraries
  – BIB, ADM, AUT, HOL, ILL, Course Reserves
  – Think ‘databases’
The basics of ALEPH

- ALEPH Applications
- ALEPH tables
- Oracle database
- Oracle tables
- HOL library
- AUT library
- ADM library
- BIB library
- Other Unix Directories
## What we learned

<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>
What we learned

✔ Beginning Aleph terminology
  – ADM unit is similar to PALS institution
  – Sublibrary is similar to PALS branch
  – Collection is similar to PALS/OCLC shelflist
  – Item status is similar to PALS Item Class
  – Patron status is similar to PALS Patron Class
  – Processing status is similar to some of the PALS Special ID’s
What we learned

✔ Systems Librarian training
  - Aleph clients
    • Install, customize and re-package GUI client
    • More complicated process for server staff and library staff
  - Aleph libraries and configuration tables associated with each
    • There are 69 tables that sites must modify; 36 tables that should be touched; 146 tables that can be modified eventually; and 39 tables that are identified as DO NOT TOUCH
What we learned

- Server staff still have to understand which tables are server-wide settings and which are unique to each ADM unit

☑ Aleph Web OPAC and GUI OPAC training
  - Connecting to OPAC through the GUI client
    - Browse and find options; command searches
    - Viewing search sets
    - Modifying a search using cross, refine and filter
    - Using the Navigation Map (can be used to move data from one module to another)
What we’ve learned

– Connecting to the Web OPAC
  • Browse and find options; multibase searches such as other Aleph databases or Z39.50 databases
  • Viewing search sets
  • Modifying a search using cross, refine and filter
  • User functions
What we’ve learned

✔ Circulation pre-Conversion
  – How to view converted patron, item and transaction data
  – Identified fields that may be of possible concern
    • Some note fields
    • Cash transaction history (fines and bills)
    • Patron links to ILL and booking data
What we’ve learned

- Patron records challenges
  - Understanding the Aleph patron record structure
    - Global
    - Local
    - ID’s
    - Privileges
  - How to share patron information across servers?
    - Blocks?
    - Fines and bills?
  - How to have unique registration numbers?
  - What global policies need to be created?
What we’ve learned

✔ Acquisitions pre-Conversion
  – How to view converted vendor, budget, order, invoice, currency, and log information
  – Identified records that may be of possible concern
    • Budgets (funds and departments)
    • Orders
    • Invoice information (part of purchase order record)
What we’ve learned

✔ Accessing the test server
  – To search the test database, point your browser to http://lute.msus.edu:4505/ALEPH
  – To access the Aleph documentation, point your browser to http://support.exlibris-usa.com:4505/D
  • Signon information was sent to all Deans, Directors, Coordinators in September
Upcoming Aleph training

- ✔ Introduction to Systems Administration, December 12 and 13
- ✔ Cataloging pre-Conversion, January 3
- ✔ Serials pre-Conversion, January 4
- ✔ Cataloging Training, January 8 and 9
- ✔ Second cataloging pre-Conversion, January 10
Upcoming Aleph training

- Second acquisitions and serials pre-conversion training, January 11
- Second circulation pre-conversion training, January 29
- Circulation training, January 30 and 31
- Course Reserves, February 1
- Systems Librarian training, day 3, February 14
Upcoming Aleph training

- HTML customization, February 15
- Acquisitions training, February 19 and 20
- Serials training, February 21 and 22
- Training not yet scheduled
  - API training
  - ILL training
  - Report writing training (ad hoc reports)
  - EDI training
  - Version 15.2 functional update training
Implementation Advisory Group

✔ Haven’t had much to discuss since spring users groups
✔ It’s now changed!
✔ Group membership, alternates and technical/functional staff
✔ Brief planning meeting scheduled for 3:30 pm today
Implementation Advisory Group

✔ Agenda for today’s meeting

– MnSCU server common interface committee formation
  • Identify committee chair
  • Identify charge to group; also composition of group

– MnSCU server indexing parameter committee formation
  • Identify committee chair
  • Identify charge to group; also composition of group

– Schedule face-to-face meeting
What’s next

- ✔ Finalize implementation contract between MnSCU and MHESO
- ✔ Continue Aleph training
- ✔ Continue to investigate Aleph tables’ options and impacts of choices
- ✔ Identify which tables are server wide and which are managed by each ADM unit
- ✔ Identify server management issues
What’s next

✔ Continue meeting with beta libraries
✔ Determine training plan for beta libraries with beta libraries input
✔ Revise project plan with new dates and additional tasks
✔ Provide TST bibliographic records and all associated data to Ex Libris for conversion
What’s next

✔ Review converted TST data
✔ Plan the conversion phase for the beta libraries with Ex Libris
✔ Investigate features and changes in 15.2
✔ Continue writing and distributing *The M-Files: Implementation News* to keep libraries informed about progress
✔ And lots more!
Questions?
Thank you for your attention!
...To be continued...