

UW System Library Service Platform Project

D	Task Name	Duration	Start	Finish	2014												2015											
					April 2014				July 2014				October 2014				January 2015				April 2015				July 2015			
1	Project Administration	333 days	Thu 5/8/14	Wed 8/12/15	[Gantt bar spanning from 5/8/14 to 8/12/15]																							
2	Steering Committee	333 days	Thu 5/8/14	Wed 8/12/15	[Gantt bar spanning from 5/8/14 to 8/12/15]																							
3	Finance	330 days	Thu 5/8/14	Fri 8/7/15	[Gantt bar spanning from 5/8/14 to 8/7/15]																							
4	Establish Budget Process	61 days	Thu 5/8/14	Thu 7/31/14	[Gantt bar spanning from 5/8/14 to 7/31/14]																							
5	Quarterly Reporting	1 day	Mon 1/5/15	Mon 1/5/15	[Gantt bar spanning from 1/5/15 to 1/5/15]																							
6	Vendor Payments	14 days	Wed 7/1/15	Mon 7/20/15	[Gantt bar spanning from 7/1/15 to 7/20/15]																							
7	Final Project Accounting	45 days	Mon 6/1/15	Sat 8/1/15	[Gantt bar spanning from 6/1/15 to 8/1/15]																							
8	Budget Closure	1 day	Fri 8/7/15	Fri 8/7/15	[Gantt bar spanning from 8/7/15 to 8/7/15]																							
9	Review & Approve Legacy System Retirement	99 days	Mon 3/23/15	Wed 8/5/15	[Gantt bar spanning from 3/23/15 to 8/5/15]																							
10	Legacy Retirement Plan	41 days	Mon 3/23/15	Fri 5/15/15	[Gantt bar spanning from 3/23/15 to 5/15/15]																							
11	Legacy Access	41 days	Mon 3/23/15	Fri 5/15/15	[Gantt bar spanning from 3/23/15 to 5/15/15]																							
12	Legacy Archive Creation	1 day	Wed 8/5/15	Wed 8/5/15	[Gantt bar spanning from 8/5/15 to 8/5/15]																							
13	Alma/Primo Governance	34 days	Wed 4/1/15	Fri 5/15/15	[Gantt bar spanning from 4/1/15 to 5/15/15]																							
14	Post Go-Live Roles	34 days	Wed 4/1/15	Fri 5/15/15	[Gantt bar spanning from 4/1/15 to 5/15/15]																							
15	Post Go-Live Meeting Schedule	34 days	Wed 4/1/15	Fri 5/15/15	[Gantt bar spanning from 4/1/15 to 5/15/15]																							
16	Post Go-Live Issue Resolution	34 days	Wed 4/1/15	Fri 5/15/15	[Gantt bar spanning from 4/1/15 to 5/15/15]																							
17	Alma Governance Process	34 days	Wed 4/1/15	Fri 5/15/15	[Gantt bar spanning from 4/1/15 to 5/15/15]																							
18	Documentation	44 days	Tue 6/2/15	Fri 7/31/15	[Gantt bar spanning from 6/2/15 to 7/31/15]																							
19	Document Retention	8 days	Wed 7/22/15	Fri 7/31/15	[Gantt bar spanning from 7/22/15 to 7/31/15]																							
20	Wiki Archive Access	5 days	Tue 6/2/15	Mon 6/8/15	[Gantt bar spanning from 6/2/15 to 6/8/15]																							
21	Vendor Contract	79 days	Wed 4/1/15	Fri 7/17/15	[Gantt bar spanning from 4/1/15 to 7/17/15]																							
22	Define Sign-Off Process	34 days	Wed 4/1/15	Fri 5/15/15	[Gantt bar spanning from 4/1/15 to 5/15/15]																							
23	Pre-Close Status Review	13 days	Wed 7/1/15	Fri 7/17/15	[Gantt bar spanning from 7/1/15 to 7/17/15]																							
24	Project Close	47 days	Tue 6/9/15	Wed 8/12/15	[Gantt bar spanning from 6/9/15 to 8/12/15]																							
25	Acknowledge Participants	1 day	Tue 6/9/15	Tue 6/9/15	[Gantt bar spanning from 6/9/15 to 6/9/15]																							
26	Approve Project Close	1 day	Fri 7/17/15	Fri 7/17/15	[Gantt bar spanning from 7/17/15 to 7/17/15]																							
27	Final Project Report	6 days	Wed 7/22/15	Wed 7/29/15	[Gantt bar spanning from 7/22/15 to 7/29/15]																							
28	Disband Teams	1 day	Fri 7/17/15	Fri 7/17/15	[Gantt bar spanning from 7/17/15 to 7/17/15]																							
29	Approve Release the PM Position on 7/31	1 day	Wed 7/29/15	Wed 7/29/15	[Gantt bar spanning from 7/29/15 to 7/29/15]																							
30	Approve Release the PD Role	1 day	Fri 8/7/15	Fri 8/7/15	[Gantt bar spanning from 8/7/15 to 8/7/15]																							
31	Disband the Steering Committee	1 day	Wed 8/12/15	Wed 8/12/15	[Gantt bar spanning from 8/12/15 to 8/12/15]																							
32	Kick-Off Event	1 day	Thu 5/8/14	Thu 5/8/14	[Gantt bar spanning from 5/8/14 to 5/8/14]																							

Project: FirstLaunch
 Date: Wed 5/27/15

Task [Progress bar] Split [Progress bar] Milestone [Progress bar] Summary [Progress bar] Project Summary [Progress bar] External Tasks [Progress bar] External Milestone [Progress bar] Deadline [Progress bar] Progress [Progress bar]

UW System Library Service Platform Project

D	Task Name	Duration	Start	Finish	Timeline																																							
					April 2014	July 2014	October 2014	January 2015	April 2015	July 2015	October 2015																																	
33	Prepare Project Management Docs	63 days	Wed 5/14/14	Fri 8/8/14	[Gantt bar from 5/14/14 to 8/8/14]																																							
34	Document Project Timeline	6 days	Wed 5/14/14	Wed 5/21/14	[Gantt bar from 5/14/14 to 5/21/14]																																							
35	Define Organizational Structure	1 day	Wed 5/21/14	Wed 5/21/14	[Milestone diamond at 5/21]																																							
36	Complete Charter	13 days	Mon 5/19/14	Wed 6/4/14	[Gantt bar from 5/19/14 to 6/4/14]																																							
37	Complete Communications Plan	3 days	Mon 5/19/14	Wed 5/21/14	[Gantt bar from 5/19/14 to 5/21/14]																																							
38	Complete Draft Project Plan	18 days	Wed 5/28/14	Fri 6/20/14	[Gantt bar from 5/28/14 to 6/20/14]																																							
39	Launch Working Project Plan	35 days	Mon 6/23/14	Fri 8/8/14	[Gantt bar from 6/23/14 to 8/8/14]																																							
40	Online Communications Dev. & Maint.	314 days	Fri 5/9/14	Fri 7/17/15	[Gantt bar from 5/9/14 to 7/17/15]																																							
41	Review Existing Wiki	4 days	Fri 5/9/14	Wed 5/14/14	[Gantt bar from 5/9/14 to 5/14/14]																																							
42	Wiki Training	6 days	Wed 5/21/14	Wed 5/28/14	[Gantt bar from 5/21/14 to 5/28/14]																																							
43	Build Organization and Initial Content	15 days	Wed 5/14/14	Tue 6/3/14	[Gantt bar from 5/14/14 to 6/3/14]																																							
44	Wiki Administration & Support	277 days	Wed 5/14/14	Mon 6/1/15	[Gantt bar from 5/14/14 to 6/1/15]																																							
45	Alma KB Design and Launch	131 days	Mon 12/15/14	Thu 6/11/15	[Gantt bar from 12/15/14 to 6/11/15]																																							
46	Wiki Document Transfer, Archiving & Shut-down	5 days	Mon 7/13/15	Fri 7/17/15	[Gantt bar from 7/13/15 to 7/17/15]																																							
47	Configuration Forms	73 days	Mon 5/12/14	Wed 8/20/14	[Gantt bar from 5/12/14 to 8/20/14]																																							
48	EL Form Template Delivery	1 day	Mon 5/12/14	Mon 5/12/14	[Milestone diamond at 5/12]																																							
49	EL Configuration Workshop	2 days	Wed 5/28/14	Thu 5/29/14	[Gantt bar from 5/28/14 to 5/29/14]																																							
50	Complete Matrix	9 days	Fri 6/6/14	Wed 6/18/14	[Gantt bar from 6/6/14 to 6/18/14]																																							
51	FTC Data Gathering	15 days	Thu 6/12/14	Wed 7/2/14	[Gantt bar from 6/12/14 to 7/2/14]																																							
52	FTC Recommendations Delivered	1 day	Thu 7/3/14	Thu 7/3/14	[Milestone diamond at 7/3]																																							
53	Campus Review of FTC Recommendations	7 days	Tue 7/8/14	Wed 7/16/14	[Gantt bar from 7/8/14 to 7/16/14]																																							
54	Campus Feedback Due on Wiki	1 day	Thu 7/17/14	Thu 7/17/14	[Milestone diamond at 7/17]																																							
55	FTCs Deliver Updated Recommendations to PD	1 day	Mon 7/21/14	Mon 7/21/14	[Milestone diamond at 7/21]																																							
56	Campus Reps Complete Forms	52 days	Wed 5/28/14	Thu 8/7/14	[Gantt bar from 5/28/14 to 8/7/14]																																							
57	Campus Reps Deliver Forms to PD	1 day	Fri 8/8/14	Fri 8/8/14	[Milestone diamond at 8/8]																																							
58	Steering Committee Review	8 days	Mon 7/21/14	Wed 7/30/14	[Gantt bar from 7/21/14 to 7/30/14]																																							

Project: FirstLaunch
 Date: Wed 5/27/15

Task: [Blue bar] Split [Dotted bar] Milestone [Diamond] Summary [Horizontal bar] Project Summary [Horizontal bar] External Tasks [Horizontal bar] External Milestone [Diamond] Deadline [Down arrow] Progress [Blue bar]

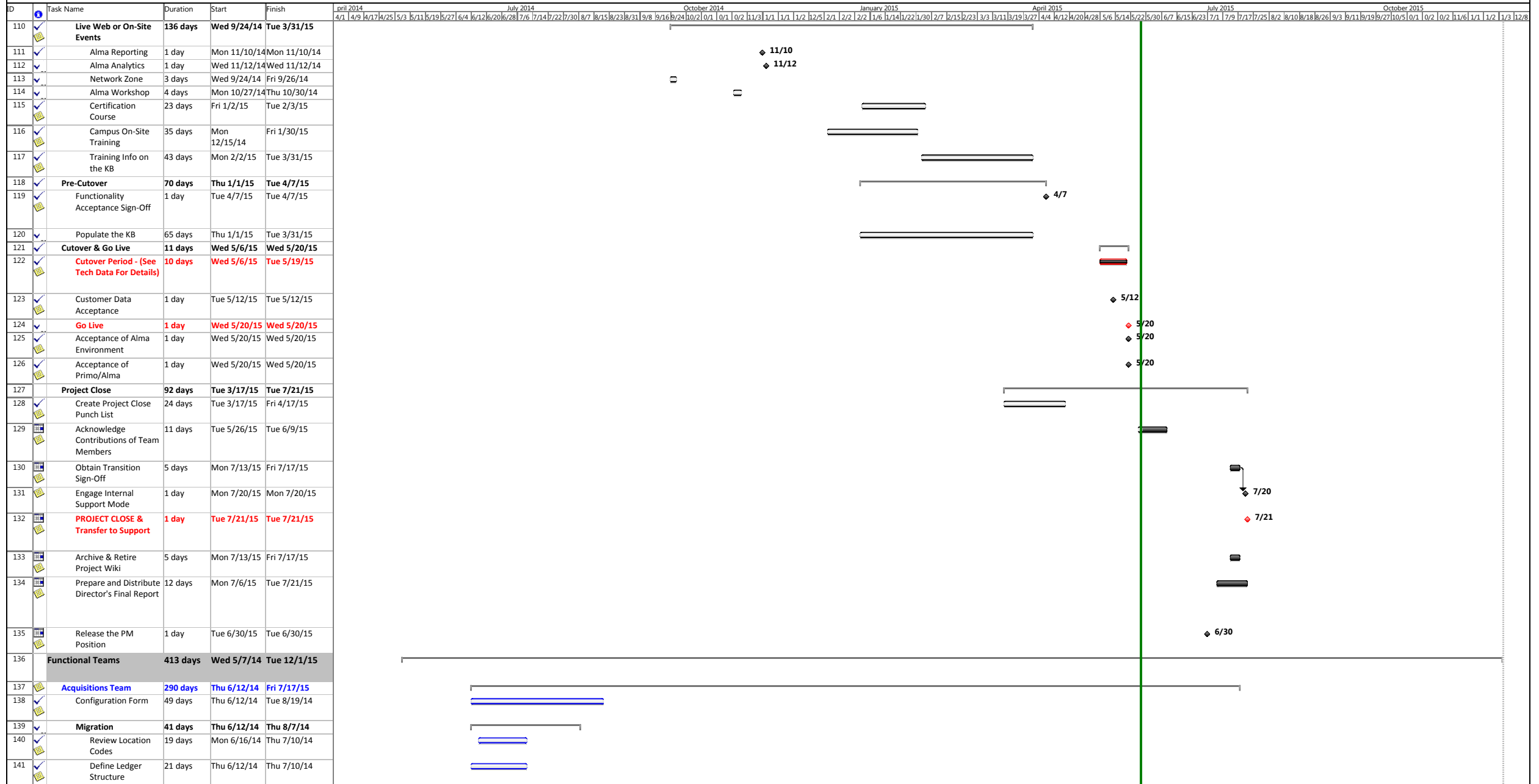
UW System Library Service Platform Project

ID	Task Name	Duration	Start	Finish	Timeline																														
					April 2014	July 2014	October 2014	January 2015	April 2015	July 2015	October 2015																								
59	Notify All Reps of Consortial Decisions	1 day	Thu 7/31/14	Thu 7/31/14	◆ 7/31																														
60	PD Delivers Forms to EL	1 day	Wed 8/20/14	Wed 8/20/14	◆ 8/20																														
61	Migration Forms	71 days	Mon 6/16/14	Fri 9/19/14	[-----]																														
62	Generate Migration Form	3 days	Mon 6/16/14	Wed 6/18/14	[=====]																														
63	Communicate Instructional Matrix	1 day	Mon 6/23/14	Mon 6/23/14	◆ 6/23																														
64	FTC Data Gathering	10 days	Thu 6/19/14	Wed 7/2/14	[=====]																														
65	Recommend Naming Conventions	10 days	Thu 6/19/14	Wed 7/2/14	[=====]																														
66	FTC Recommendations Delivered	1 day	Thu 7/3/14	Thu 7/3/14	◆ 7/3																														
67	Campus Review of FTC Recommendations	7 days	Tue 7/8/14	Wed 7/16/14	[=====]																														
68	Campus Feedback Due on Wiki	1 day	Fri 7/18/14	Fri 7/18/14	◆ 7/18																														
69	FTCs Deliver Updated Recommendations to PD	1 day	Mon 7/21/14	Mon 7/21/14	◆ 7/21																														
70	Pre-Migration Testing - 3 Campuses	37 days	Tue 7/1/14	Wed 8/20/14	[-----]																														
71	Re-Generate Migration Forms for Test Campuses	7 days	Tue 7/1/14	Wed 7/9/14	[=====]																														
72	Campuses Complete Test Migration Form	11 days	Thu 7/3/14	Thu 7/17/14	[=====]																														
73	Submit Test Migration Forms to EL	1 day	Fri 7/18/14	Fri 7/18/14	◆ 7/18																														
74	Pre-Migration Extract - EL	18 days	Mon 7/28/14	Wed 8/20/14	[=====]																														
75	Steering Committee Review	8 days	Mon 7/21/14	Wed 7/30/14	[=====]																														
76	Notify All Reps of Consortial Decisions	1 day	Thu 7/31/14	Thu 7/31/14	◆ 7/31																														
77	All Reps Complete Mig Forms (Except Test Campuses)	45 days	Fri 6/20/14	Thu 8/21/14	[=====]																														
78	All Reps Deliver Mig Forms to PD for Review (Except Test Campuses)	1 day	Fri 8/22/14	Fri 8/22/14	◆ 8/22																														
79	Final Migration Forms	16 days	Sun 8/31/14	Fri 9/19/14	[-----]																														
80	September Alma Release	1 day	Sun 8/31/14	Sun 8/31/14	◆ 8/31																														
81	September Forms Extract	2 days	Tue 9/2/14	Wed 9/3/14	[=====]																														

Project: FirstLaunch Date: Wed 5/27/15

Task: [Progress Bar] Split [Icon] Milestone [Icon] Summary [Icon] Project Summary [Icon] External Tasks [Icon] External Milestone [Icon] Deadline [Icon] Progress [Progress Bar]

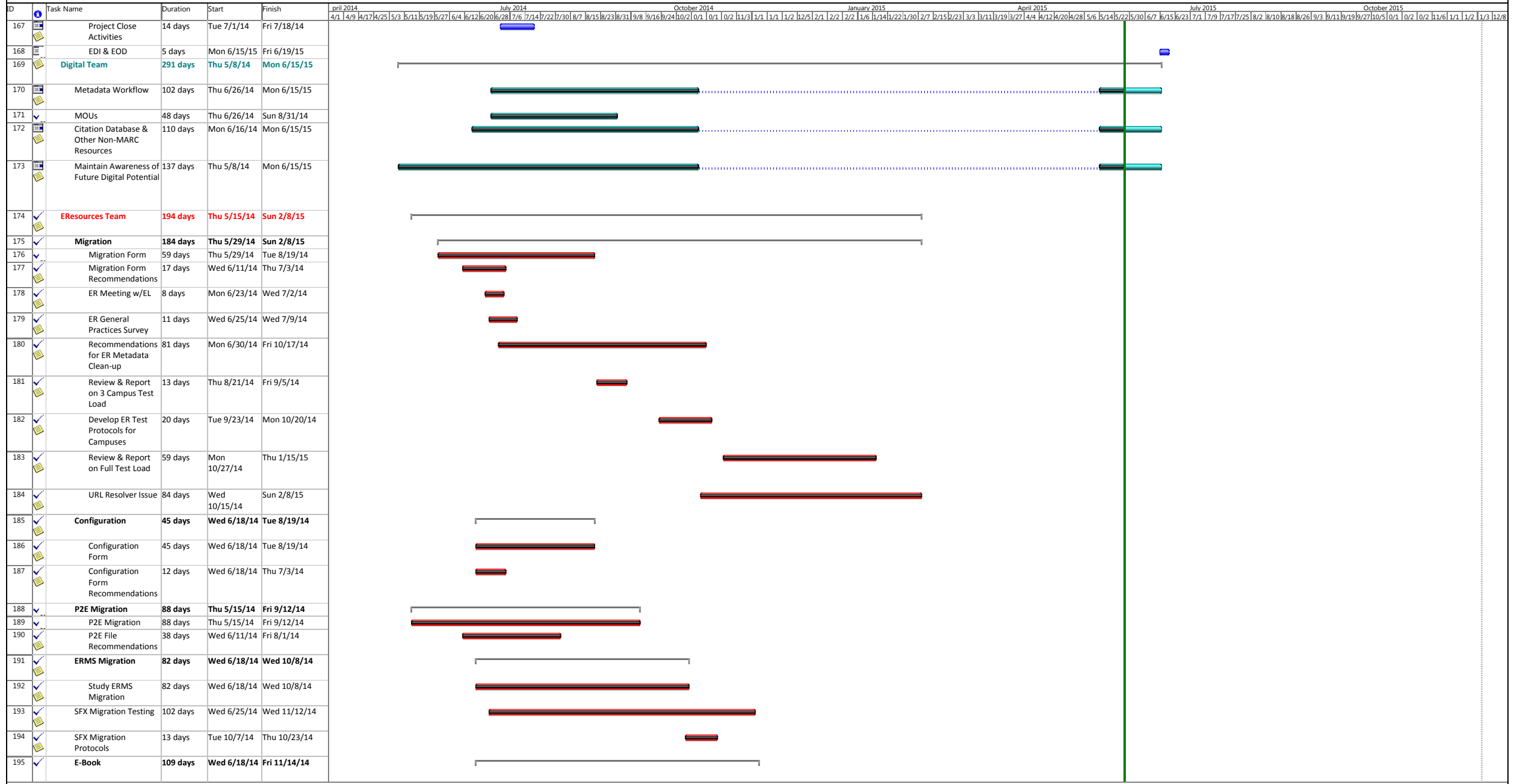
UW System Library Service Platform Project



Project: FirstLaunch Date: Wed 5/27/15

Task: Split Milestone Summary Project Summary External Tasks External Milestone Deadline Progress

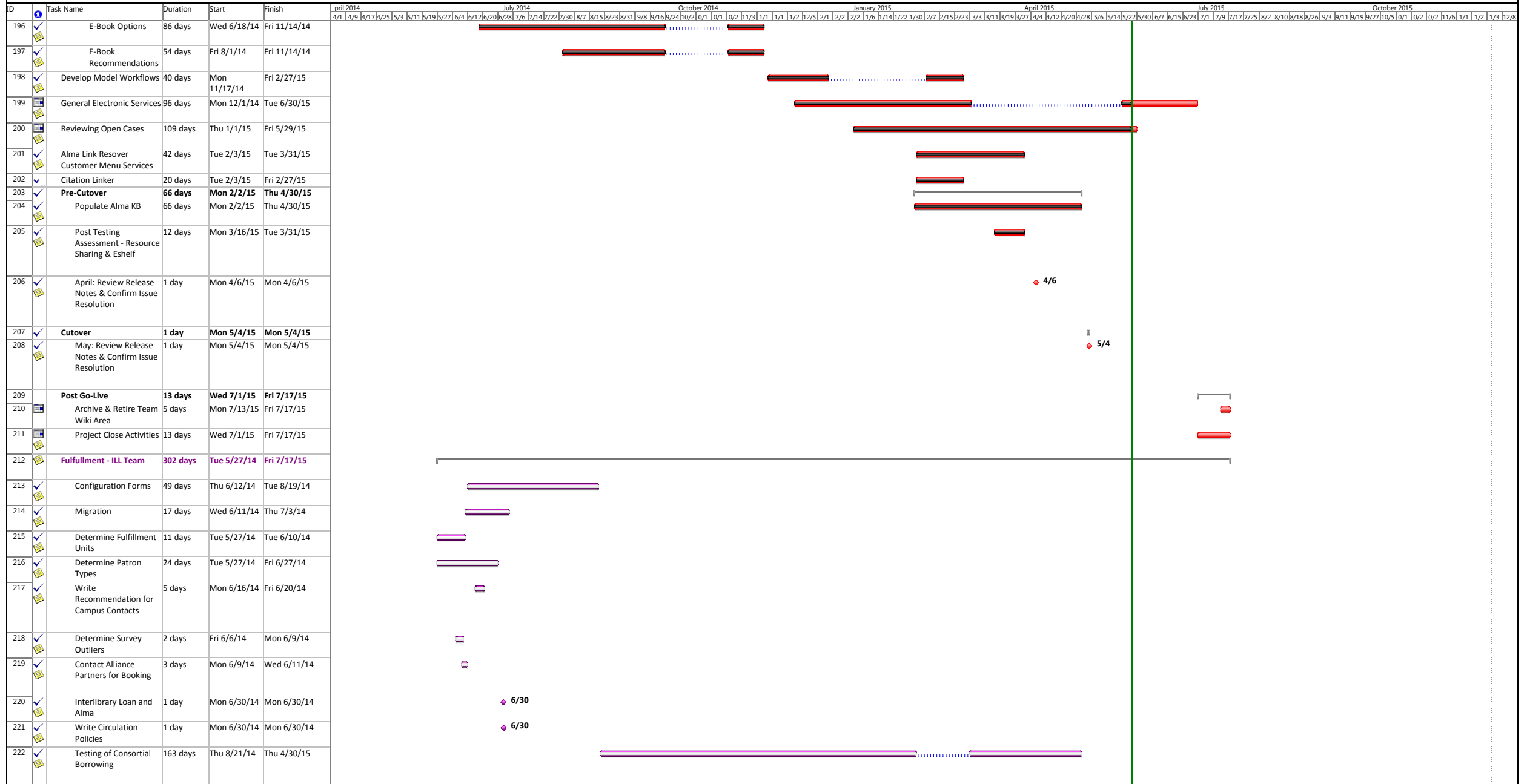
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Task Split Milestone Summary Project Summary External Tasks External Milestone Deadline Progress

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Project: FirstLaunch Date: Wed 5/27/15

Legend: Task (blue bar), Split (dotted bar), Milestone (diamond), Summary (grey bar), Project Summary (light grey bar), External Tasks (grey bar), External Milestone (diamond), Deadline (green arrow), Progress (blue bar)

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ID	Task Name	Duration	Start	Finish	Timeline																														
					Apr 2014	May 2014	Jun 2014	Jul 2014	Aug 2014	Sep 2014	Oct 2014	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015	Apr 2015	May 2015	Jun 2015	Jul 2015	Aug 2015	Sep 2015	Oct 2015												
223	Determine Policies for Transiting Items	125 days	Tue 7/1/14	Fri 12/19/14	[Task bar spanning from July 1, 2014 to December 19, 2014]																														
224	Set Up the User Templates	21 days	Mon 8/4/14	Sun 8/31/14	[Task bar spanning from August 4, 2014 to August 31, 2014]																														
225	Run a Report of All Patrons w/More than 1 Active Bar Code	1 day	Fri 5/15/15	Fri 5/15/15	[Task bar at May 15, 2015 with diamond marker]																														
226	Run a Report of All Patrons w/Protected Address Field	1 day	Fri 5/15/15	Fri 5/15/15	[Task bar at May 15, 2015 with diamond marker]																														
227	Identify Testing Areas - Consortial	6 days	Thu 7/17/14	Thu 7/24/14	[Task bar spanning from July 17, 2014 to July 24, 2014]																														
228	Fulfillment Input on 3rd Party Integrations	3 days	Mon 9/8/14	Wed 9/10/14	[Task bar spanning from September 8, 2014 to September 10, 2014]																														
229	Re-Create Patron Provisioning	5 days	Mon 9/8/14	Fri 9/12/14	[Task bar spanning from September 8, 2014 to September 12, 2014]																														
230	Run Proxy Report for All Patrons	1 day	Fri 5/15/15	Fri 5/15/15	[Task bar at May 15, 2015 with diamond marker]																														
231	Security Lock Down Recommendations	1 day	Tue 10/7/14	Tue 10/7/14	[Task bar at October 7, 2014 with diamond marker]																														
232	Special Use Patrons	19 days	Tue 10/7/14	Fri 10/31/14	[Task bar spanning from October 7, 2014 to October 31, 2014]																														
233	Put Sample Customized Notices on Wiki	65 days	Mon 10/13/14	Fri 1/9/15	[Task bar spanning from October 13, 2014 to January 9, 2015]																														
234	Review EL Training Materials	5 days	Mon 10/13/14	Fri 10/17/14	[Task bar spanning from October 13, 2014 to October 17, 2014]																														
235	Update Questions for Alma Workshop	5 days	Mon 10/13/14	Fri 10/17/14	[Task bar spanning from October 13, 2014 to October 17, 2014]																														
236	Stopping UB - ILL Input	30 days	Mon 10/13/14	Fri 11/21/14	[Task bar spanning from October 13, 2014 to November 21, 2014]																														
237	Resolution on UB Patron Issue	10 days	Mon 1/5/15	Fri 1/16/15	[Task bar spanning from January 5, 2015 to January 16, 2015]																														
238	Pre-Cutover	66 days	Mon 2/2/15	Thu 4/30/15	[Task bar spanning from February 2, 2015 to April 30, 2015]																														
239	Populate Alma KB	66 days	Mon 2/2/15	Thu 4/30/15	[Task bar spanning from February 2, 2015 to April 30, 2015]																														
240	Post Testing Assessment - Resource Sharing & Eshelf	20 days	Mon 3/16/15	Fri 4/10/15	[Task bar spanning from March 16, 2015 to April 10, 2015]																														
241	April: Review Release Notes & Confirm Issue Resolution	1 day	Mon 4/6/15	Mon 4/6/15	[Task bar at April 6, 2015 with diamond marker]																														
242	Cutover	12 days	Mon 5/4/15	Tue 5/19/15	[Task bar spanning from May 4, 2015 to May 19, 2015]																														
243	May: Review Release Notes & Confirm Issue Resolution	1 day	Mon 5/4/15	Mon 5/4/15	[Task bar at May 4, 2015 with diamond marker]																														
244	Testing - Clean Patron, Loan & Request Data	1 day	Tue 5/19/15	Tue 5/19/15	[Task bar at May 19, 2015 with diamond marker]																														
245	Post Go-Live	13 days	Wed 7/1/15	Fri 7/17/15	[Task bar spanning from July 1, 2015 to July 17, 2015]																														
246	Archive & Retire Team Wiki Area	5 days	Mon 7/13/15	Fri 7/17/15	[Task bar spanning from July 13, 2015 to July 17, 2015]																														

Project: FirstLaunch Date: Wed 5/27/15

Task: [Blue bar] Split [Dotted bar] Milestone [Diamond] Summary [Grey bar] Project Summary [Grey bar] External Tasks [Grey bar] External Milestone [Diamond] Deadline [Green arrow down] Progress [Blue bar]

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					Apr 2014	May 2014	Jun 2014	Jul 2014	Aug 2014	Sep 2014	Oct 2014	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015	Apr 2015	May 2015	Jun 2015	Jul 2015	Aug 2015	Sep 2015	Oct 2015																													
247	Project Close Activities	13 days	Wed 7/1/15	Fri 7/17/15	[Timeline bar from 7/1/15 to 7/17/15]																																															
248	Resource Management Team	315 days	Thu 5/8/14	Fri 7/17/15	[Timeline bar from 5/8/14 to 7/17/15]																																															
249	Configuration Forms	49 days	Thu 6/12/14	Tue 8/19/14	[Timeline bar from 6/12/14 to 8/19/14]																																															
250	Migration	21 days	Tue 6/24/14	Tue 7/22/14	[Timeline bar from 6/24/14 to 7/22/14]																																															
251	Data Clean-Up	99 days	Wed 6/11/14	Fri 10/24/14	[Timeline bar from 6/11/14 to 10/24/14]																																															
252	Master List of Data Clean-up Projects	82 days	Wed 6/11/14	Wed 10/1/14	[Timeline bar from 6/11/14 to 10/1/14]																																															
253	Develop Grid for Tracking Campus Progress	38 days	Wed 9/3/14	Fri 10/24/14	[Timeline bar from 9/3/14 to 10/24/14]																																															
254	Local Extensions	64 days	Thu 5/8/14	Tue 8/5/14	[Timeline bar from 5/8/14 to 8/5/14]																																															
255	AQuery	9 days	Fri 6/13/14	Wed 6/25/14	[Timeline bar from 6/13/14 to 6/25/14]																																															
256	Third Party Remediation Bid	83 days	Mon 5/12/14	Tue 9/2/14	[Timeline bar from 5/12/14 to 9/2/14]																																															
257	Locations	38 days	Wed 5/28/14	Fri 7/18/14	[Timeline bar from 5/28/14 to 7/18/14]																																															
258	Plans for a Read Only Archive of Voyager Data	2 days	Wed 6/11/14	Thu 6/12/14	[Timeline bar from 6/11/14 to 6/12/14]																																															
259	Data Cleansing-Vendors Identification	7 days	Mon 6/2/14	Tue 6/10/14	[Timeline bar from 6/2/14 to 6/10/14]																																															
260	Develop Policy Statements Subject Heading Thesauri	54 days	Wed 6/18/14	Sun 8/31/14	[Timeline bar from 6/18/14 to 8/31/14]																																															
261	OCLC Local Holding Report & Connexion	179 days	Mon 10/27/14	Tue 6/30/15	[Timeline bar from 10/27/14 to 6/30/15]																																															
262	OCLC Connexion	70 days	Mon 10/27/14	Fri 1/30/15	[Timeline bar from 10/27/14 to 1/30/15]																																															
263	Publish to OCLC Job	70 days	Mon 10/27/14	Fri 1/30/15	[Timeline bar from 10/27/14 to 1/30/15]																																															
264	OCLC Batchload Procedures	40 days	Mon 2/23/15	Fri 4/17/15	[Timeline bar from 2/23/15 to 4/17/15]																																															
265	Local Holdings Records	114 days	Mon 12/1/14	Tue 6/30/15	[Timeline bar from 12/1/14 to 6/30/15]																																															
266	UW Systems RM Decisions	129 days	Mon 11/24/14	Tue 5/19/15	[Timeline bar from 11/24/14 to 5/19/15]																																															
267	Test Review	66 days	Mon 7/28/14	Fri 10/24/14	[Timeline bar from 7/28/14 to 10/24/14]																																															
268	Develop Resource Mgt Rubric for Review	48 days	Mon 7/28/14	Tue 9/30/14	[Timeline bar from 7/28/14 to 9/30/14]																																															
269	Develop Mechanism for Reporting Results	34 days	Tue 9/2/14	Fri 10/17/14	[Timeline bar from 9/2/14 to 10/17/14]																																															
270	Develop Decision Process - EL and UW Issues	39 days	Tue 9/2/14	Fri 10/24/14	[Timeline bar from 9/2/14 to 10/24/14]																																															
271	Testing Protocols - Functionality	28 days	Mon 8/25/14	Tue 9/30/14	[Timeline bar from 8/25/14 to 9/30/14]																																															
272	Pre-Cutover	66 days	Mon 2/2/15	Thu 4/30/15	[Timeline bar from 2/2/15 to 4/30/15]																																															

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Task Split Milestone Summary Project Summary External Tasks External Milestone Deadline Progress

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					April 2014	May 2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015	February 2015	March 2015	April 2015	May 2015
273	Populate Alma KB	66 days	Mon 2/2/15	Thu 4/30/15														
274	Post Testing Assessment - Resource Sharing & Eshelf	20 days	Mon 3/16/15	Fri 4/10/15														
275	April: Review Release Notes & Confirm Issue Resolution	1 day	Mon 4/6/15	Mon 4/6/15														
276	Cutover	1 day	Mon 5/4/15	Mon 5/4/15														
277	May: Review Release Notes & Confirm Issue Resolution	1 day	Mon 5/4/15	Mon 5/4/15														
278	Post Go-Live	232 days	Mon 9/1/14	Fri 7/17/15														
279	Post-Migration Clean Up Plan	70 days	Mon 9/15/14	Fri 12/19/14														
280	Third Party Remediation Bid	5 days	Mon 9/29/14	Fri 10/3/14														
281	Complete Processing Profile	131 days	Mon 9/1/14	Fri 2/27/15														
282	Archive & Retire Team Wiki Area	5 days	Mon 7/13/15	Fri 7/17/15														
283	Project Close Activities	5 days	Wed 7/1/15	Tue 7/7/15														
284	Discovery Team	387 days	Thu 6/12/14	Tue 12/1/15														
285	Configuration Forms	49 days	Thu 6/12/14	Tue 8/19/14														
286	Migration	47 days	Thu 6/19/14	Fri 8/22/14														
287	Archival Materials	204 days	Tue 8/12/14	Tue 5/19/15														
288	Review How Archival Materials Display in Primo	169 days	Tue 8/12/14	Wed 4/1/15														
289	Archival Circulation	43 days	Mon 3/23/15	Tue 5/19/15														
290	New Primo Box	231 days	Mon 6/16/14	Wed 4/29/15														
291	Configuration	231 days	Mon 6/16/14	Wed 4/29/15														
292	Migrate Custom Web	44 days	Tue 9/2/14	Fri 10/31/14														
293	Configure New Primo Central	21 days	Tue 9/2/14	Tue 9/30/14														
294	Revisit Usability	24 days	Mon 6/30/14	Thu 7/31/14														
295	Planning for Usability	26 days	Mon 1/26/15	Fri 2/27/15														
296	Usability Testing	8 days	Mon 4/6/15	Wed 4/15/15														
297	Primo Upgrade	9 days	Sun 4/19/15	Wed 4/29/15														
298	Resource Sharing Issues in Primo	121 days	Mon 9/29/14	Fri 3/13/15														
299	Primo A-Z List	21 days	Tue 9/2/14	Tue 9/30/14														

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UW System Library Service Platform Project

ID	Task Name	Duration	Start	Finish	Timeline																																															
					Apr 2014	May 2014	Jun 2014	Jul 2014	Aug 2014	Sep 2014	Oct 2014	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015	Apr 2015	May 2015	Jun 2015	Jul 2015	Aug 2015	Sep 2015	Oct 2015																													
300	Open URL Screens	130 days	Tue 9/2/14	Fri 2/27/15																																																
301	Redo the Norm Rules for Primo	40 days	Mon 10/27/14	Fri 12/19/14																																																
302	856 Linking	116 days	Thu 6/26/14	Wed 12/3/14																																																
303	Renorm - Reindex	35 days	Tue 2/3/15	Fri 3/20/15																																																
304	Details Tab - Display in Primo	106 days	Mon 6/16/14	Fri 11/7/14																																																
305	Browse Functionality	87 days	Fri 8/1/14	Fri 11/28/14																																																
306	Revisit Government Docs	43 days	Mon 8/4/14	Tue 9/30/14																																																
307	Revisit Ebook Handling	43 days	Mon 8/4/14	Tue 9/30/14																																																
308	Revisit Location Names and Facets	40 days	Mon 10/27/14	Fri 12/19/14																																																
309	Pick Up Location -	101 days	Mon 6/16/14	Fri 10/31/14																																																
310	Item Status Revision in the RTA Box	153 days	Fri 8/1/14	Fri 2/27/15																																																
311	Alert CUWL User Services	10 days	Mon 7/21/14	Fri 8/1/14																																																
312	Build Archival Libraries into Separate Scope	21 days	Fri 11/14/14	Fri 12/12/14																																																
313	Campuses Add Search Scope	19 days	Tue 11/18/14	Fri 12/12/14																																																
314	Testing	174 days	Thu 7/17/14	Fri 3/13/15																																																
315	Develop a Coordinating Testing Plan	63 days	Thu 7/17/14	Fri 10/10/14																																																
316	Coordinated Testing w/Fulfillment	111 days	Mon 10/13/14	Fri 3/13/15																																																
317	Directives to the Campus Contacts	116 days	Mon 9/29/14	Fri 3/6/15																																																
318	Activate PCI	12 days	Tue 9/30/14	Wed 10/15/14																																																
319	Primo Views - Other Campuses	38 days	Sat 11/1/14	Wed 12/24/14																																																
320	Verify Proxy	26 days	Fri 11/7/14	Fri 12/12/14																																																
321	Verify Digital Collection Pipe	55 days	Mon 12/1/14	Thu 2/12/15																																																
322	Customize New SFX Screens	104 days	Wed 10/15/14	Fri 3/6/15																																																
323	Permalinks to Primo	10 days	Mon 9/29/14	Fri 10/10/14																																																

Project: FirstLaunch
Date: Wed 5/27/15

Task Split Milestone Summary Project Summary External Tasks External Milestone Deadline Progress

UW System Library Service Platform Project

ID	Task Name	Duration	Start	Finish	Timeline																														
					April 2014	July 2014	October 2014	January 2015	April 2015	July 2015	October 2015																								
324	Brown Bag Training on Primo Changes	22 days	Tue 11/4/14	Wed 12/3/14	[Task bar]																														
325	Pre-Cutover	66 days	Mon 2/2/15	Thu 4/30/15	[Task bar]																														
326	Populate Alma KB	66 days	Mon 2/2/15	Thu 4/30/15	[Task bar]																														
327	Post Testing Assessment - Resource Sharing & Eshelf	12 days	Mon 3/16/15	Tue 3/31/15	[Task bar]																														
328	April: Review Release Notes & Confirm Issue Resolution	1 day	Mon 4/6/15	Mon 4/6/15	◆ 4/6																														
329	Cutover	264 days	Mon 12/1/14	Tue 12/1/15	[Task bar]																														
330	Protocol for Shutting Down UB in Primo	8 days	Wed 12/3/14	Fri 12/12/14	[Task bar]																														
331	Set Up an SFX Redirect for URL	5 days	Mon 1/26/15	Fri 1/30/15	[Task bar]																														
332	Voyager URL Redirect	84 days	Mon 1/26/15	Tue 5/19/15	[Task bar]																														
333	Cutover Notifications	78 days	Mon 12/1/14	Tue 3/17/15	[Task bar]																														
334	Turn off UB in Current Primo	1 day	Thu 4/9/15	Thu 4/9/15	◆ 4/9																														
335	Post Notice on Primo with Alma	1 day	Fri 5/1/15	Fri 5/1/15	◆ 5/1																														
336	May: Review Release Notes & Confirm Issue Resolution	1 day	Mon 5/4/15	Mon 5/4/15	◆ 5/4																														
337	Verify Primo	1 day	Tue 5/19/15	Tue 5/19/15	◆ 5/19																														
338	Coordinate Reload and Reindex of Data Remediation	66 days	Tue 9/1/15	Tue 12/1/15	[Task bar]																														
339	Reloading Authorities	45 days	Mon 8/3/15	Fri 10/2/15	[Task bar]																														
340	Post Go-Live	35 days	Mon 6/1/15	Fri 7/17/15	[Task bar]																														
341	Archive & Retire Team Wiki Area	5 days	Mon 7/13/15	Fri 7/17/15	[Task bar]																														
342	Project Close Activities	13 days	Wed 7/1/15	Fri 7/17/15	[Task bar]																														
343	Resource Sharing Clean-Up	25 days	Mon 6/15/15	Fri 7/17/15	[Task bar]																														
344	Archives - Call # and Barcode	30 days	Mon 6/1/15	Fri 7/10/15	[Task bar]																														
345	Technical - Data Team	369 days	Wed 5/7/14	Wed 9/30/15	[Task bar]																														
346	De-duplication (Bib data) Analysis and Testing	65 days	Mon 6/2/14	Fri 8/29/14	[Task bar]																														
347	Generation of Test Protocol	6 days	Thu 6/5/14	Thu 6/12/14	[Task bar]																														
348	Generation of Test Sets	6 days	Thu 6/5/14	Thu 6/12/14	[Task bar]																														
349	Testing & Error Reporting	7 days	Thu 6/5/14	Fri 6/13/14	[Task bar]																														

Project: FirstLaunch Date: Wed 5/27/15

Legend: Task (blue bar), Split (dotted bar), Milestone (diamond), Summary (grey bar), Project Summary (grey bar), External Tasks (grey bar), External Milestone (grey diamond), Deadline (green arrow), Progress (blue bar)

UW System Library Service Platform Project

ID	Task Name	Duration	Start	Finish	Timeline																														
					April 2014	May 2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015	February 2015	March 2015	April 2015	May 2015	June 2015	July 2015	August 2015	September 2015	October 2015	November 2015	December 2015	January 2016	February 2016	March 2016	April 2016	May 2016	June 2016	July 2016	August 2016	September 2016	October 2016
350	Meeting with the EL Migration Team	21 days	Mon 6/2/14	Mon 6/30/14																															
351	Supressed Records Analysis	10 days	Mon 7/14/14	Fri 7/25/14																															
352	Multiple Match Simulation	10 days	Mon 7/14/14	Fri 7/25/14																															
353	Three Campus Test Load Extract	8 days	Wed 8/20/14	Fri 8/29/14																															
354	Bib Data Cleansing Planning	31 days	Tue 6/3/14	Tue 7/15/14																															
355	Pre -vs- Post Migration Analysis	31 days	Tue 6/3/14	Tue 7/15/14																															
356	Deliverable - Analysis	1 day	Mon 6/30/14	Mon 6/30/14																															
357	Locally Enhanced MARC Records - Analysis & Planning	288 days	Wed 5/28/14	Tue 6/30/15																															
358	Create a Wiki Page to Collect Info	1 day	Wed 5/28/14	Wed 5/28/14																															
359	Post Request for Registering Data Sets	1 day	Thu 6/5/14	Thu 6/5/14																															
360	Receive Responses from Catalogers	12 days	Thu 6/5/14	Fri 6/20/14																															
361	Tech Data Team Analyses of Responses	6 days	Mon 6/23/14	Mon 6/30/14																															
362	Estimate & Determine Number of Records to be Added to Madison	84 days	Mon 6/30/14	Tue 1/20/15																															
363	Load Local Enhancements	22 days	Mon 6/1/15	Tue 6/30/15																															
364	Enhanced Record Proof of Concept	23 days	Wed 6/25/14	Fri 7/25/14																															
365	Non-Migrating Data Inventory & Planning	284 days	Fri 5/30/14	Fri 6/26/15																															
366	Create a Template & Inventory page	1 day	Fri 5/30/14	Fri 5/30/14																															
367	Identify Types of Non-Migrating Data	65 days	Mon 6/2/14	Fri 8/29/14																															
368	Preserve Voyager Snapshot - Define Requirements	121 days	Tue 9/2/14	Fri 6/26/15																															
369	Business Analysis of NM Types	44 days	Tue 9/2/14	Fri 10/31/14																															

Project: FirstLaunch
 Date: Wed 5/27/15

Task: Split Milestone Summary Project Summary External Tasks External Milestone Deadline Progress

UW System Library Service Platform Project

D	Task Name	Duration	Start	Finish	April 2014												July 2014												October 2014												January 2015												April 2015												July 2015												October 2015											
					4/1	4/9	4/17	4/25	5/3	5/11	5/19	5/27	6/4	6/12	6/20	6/28	7/6	7/14	7/22	7/30	8/7	8/15	8/23	8/31	9/8	9/16	9/24	10/2	10/10	10/18	10/26	11/3	11/11	11/19	11/27	12/5	12/13	12/21	12/29	1/6	1/14	1/22	1/30	2/7	2/15	2/23	3/3	3/11	3/19	3/27	4/4	4/12	4/20	4/28	5/6	5/14	5/22	5/30	6/7	6/15	6/23	7/1	7/9	7/17	7/25	8/2	8/10	8/18	8/26	9/3	9/11	9/19	9/27	10/5	10/13	10/21	10/29	11/6	11/14	11/22	11/30	12/8						
370	Create Historical Fines App	145 days	Mon 11/3/14	Wed 5/20/15																																																																																				
371	Final Extract - Historical Fines	3 days	Mon 5/18/15	Wed 5/20/15																																																																																				
372	Patron provisioning	314 days	Wed 5/7/14	Wed 7/15/15																																																																																				
373	Survey	58 days	Wed 5/7/14	Fri 7/25/14																																																																																				
374	Conduct Survey of Current Provisioning Practices	10 days	Wed 5/7/14	Tue 5/20/14																																																																																				
375	Launch Follow-up Survey	1 day	Mon 6/16/14	Mon 6/16/14																																																																																				
376	Collect Survey Responses	9 days	Tue 6/17/14	Fri 6/27/14																																																																																				
377	Perform Analysis of Survey Data	20 days	Mon 6/30/14	Fri 7/25/14																																																																																				
378	Meet with IIA Steering Committee	1 day	Wed 5/21/14	Wed 5/21/14																																																																																				
379	Meet With Middleware Group	1 day	Wed 6/11/14	Wed 6/11/14																																																																																				
380	Coordinate with Fulfillment Team	12 days	Thu 7/17/14	Fri 8/1/14																																																																																				
381	Extend Special Use Privileges	54 days	Mon 7/21/14	Wed 10/1/14																																																																																				
382	Patron Data Migration	11 days	Thu 8/21/14	Wed 9/3/14																																																																																				
383	Deliver Population Attributes & Processing Schedule Info to DoIT Middleware	7 days	Fri 8/1/14	Mon 8/11/14																																																																																				
384	Gap Analysis & Implementation Planning	19 days	Mon 8/11/14	Wed 9/3/14																																																																																				
385	UW Gap Analysis Follow-Up	7 days	Thu 9/4/14	Fri 9/12/14																																																																																				
386	ILLiad - Campus Survey	16 days	Fri 1/9/15	Fri 1/30/15																																																																																				
387	Patron Migration	19 days	Mon 8/18/14	Wed 9/10/14																																																																																				
388	ID Middleware Responsibilities	1 day	Mon 8/18/14	Mon 8/18/14																																																																																				
389	Map Current Patrons	13 days	Tue 8/26/14	Wed 9/10/14																																																																																				
390	Implementation	229 days	Tue 9/2/14	Wed 7/15/15																																																																																				
391	Obtain & Examine Campus Data	21 days	Tue 9/2/14	Tue 9/30/14																																																																																				

Project: FirstLaunch Date: Wed 5/27/15

Task Split Milestone Summary Project Summary External Tasks External Milestone Deadline Progress

UW System Library Service Platform Project

ID	Task Name	Duration	Start	Finish	Timeline																																																																														
					April 2014												July 2014												October 2014												January 2015												April 2015												July 2015												October 2015						
392	Compare Extract w/ Current Voyager SIF	44 days	Tue 9/30/14	Fri 11/28/14																																																																															
393	Create Patron Import Files from the IAA Feed	48 days	Wed 10/1/14	Fri 12/5/14																																																																															
394	Implment Identifier Management	30 days	Mon 10/6/14	Fri 11/14/14																																																																															
395	Test Patron Import in Alma	15 days	Mon 11/17/14	Fri 12/5/14																																																																															
396	Voyager SIF to Alma External Load File Transformation	98 days	Mon 11/3/14	Fri 7/3/15																																																																															
397	Develop & Test Patron Import Scripts	57 days	Fri 12/12/14	Fri 2/27/15																																																																															
398	Verify Loaded Data	29 days	Mon 3/23/15	Wed 4/29/15																																																																															
399	Implement Patron Reporting & Monitoring	110 days	Fri 12/12/14	Mon 6/1/15																																																																															
400	Patron Processing Support Tools	23 days	Mon 6/15/15	Wed 7/15/15																																																																															
401	New Authentication - Community	32 days	Fri 5/1/15	Mon 6/15/15																																																																															
402	Shibboleth Integration w/Alma	14 days	Tue 9/30/14	Fri 10/17/14																																																																															
403	Illiad - Implement Patron Processing	110 days	Mon 12/22/14	Wed 5/20/15																																																																															
404	Achieve Production Footing	13 days	Fri 5/1/15	Tue 5/19/15																																																																															
405	Establish Chain of Contact	13 days	Fri 5/1/15	Tue 5/19/15																																																																															
406	Document Processes	13 days	Fri 5/1/15	Tue 5/19/15																																																																															
407	Support & Escalation Procedures	13 days	Fri 5/1/15	Tue 5/19/15																																																																															
408	Begin Daily Loading	18 days	Fri 1/2/15	Fri 6/5/15																																																																															
409	Final Reconciliation & Test Update	11 days	Wed 5/13/15	Wed 5/27/15																																																																															
410	Aquery	323 days	Mon 5/12/14	Fri 7/31/15																																																																															

Project: FirstLaunch
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Legend: Task (Blue bar), Split (Dotted line), Milestone (Diamond), Summary (Grey bar), Project Summary (Light Grey bar), External Tasks (Grey bar), External Milestone (Diamond), Deadline (Green arrow), Progress (Blue bar)

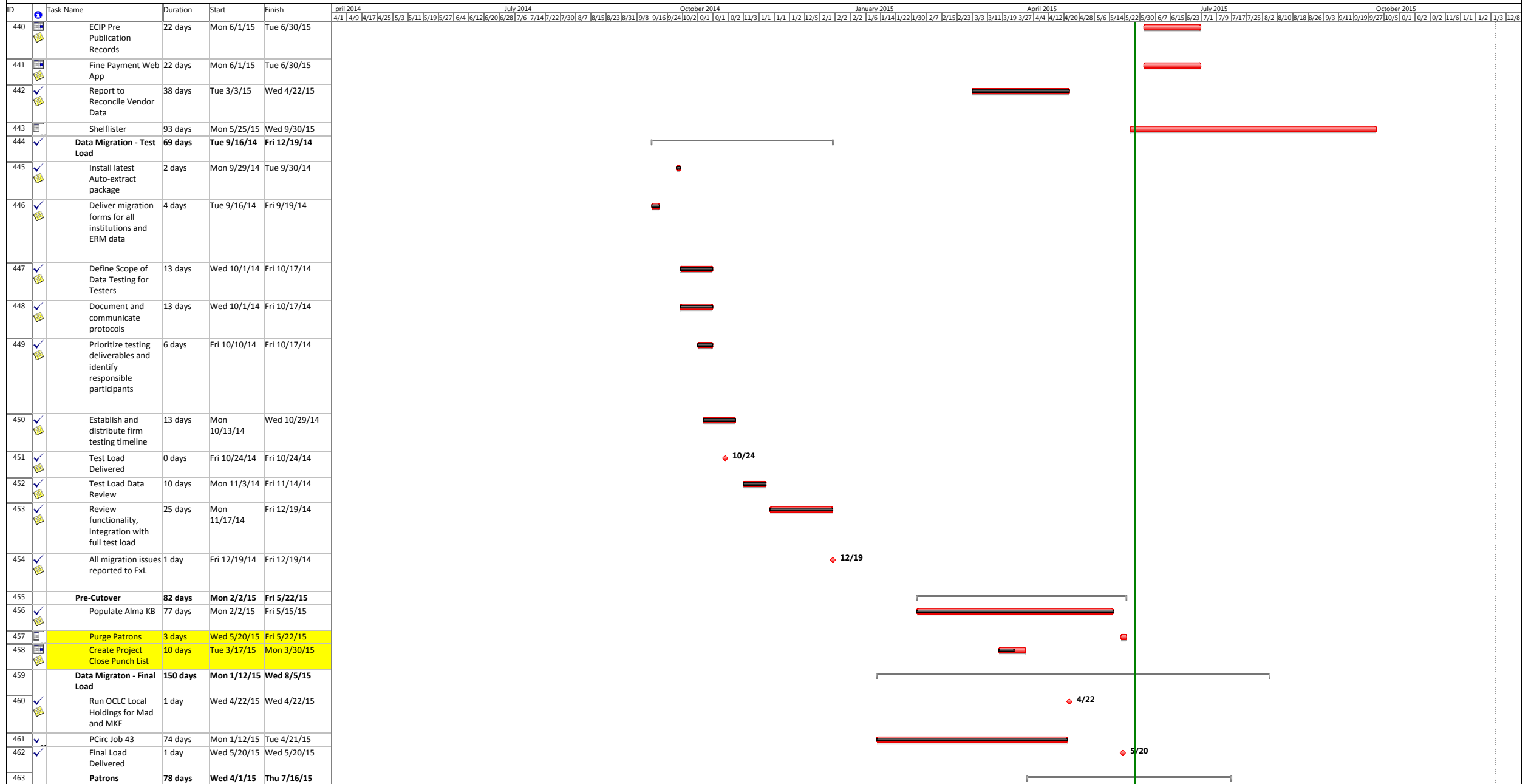
UW System Library Service Platform Project

D	Task Name	Duration	Start	Finish	April 2014												July 2014												October 2014												January 2015												April 2015												July 2015												October 2015											
					4/1	4/9	4/17	4/25	5/3	5/11	5/19	5/27	6/4	6/12	6/20	6/28	7/6	7/14	7/22	7/30	8/7	8/15	8/23	8/31	9/8	9/16	9/24	10/2	10/11	10/22	11/3	1/1	1/11	1/21	1/31	2/2	2/22	2/22	3/6	3/14	3/22	3/30	4/7	4/15	4/23	4/30	5/6	5/14	5/22	5/30	6/7	6/15	6/23	7/1	7/9	7/17	7/25	8/2	8/10	8/18	8/26	9/3	9/11	9/19	9/27	10/5	10/11	10/22	11/6	1/1	1/2	1/3	1/28															
411	Build & Deploy Test Instance	13 days	Mon 5/12/14	Wed 5/28/14	[Gantt bar]																																																																																			
412	Build & Deploy Production Instance	3 days	Tue 6/3/14	Thu 6/5/14	[Gantt bar]																																																																																			
413	Incorporation of ArCat Data	8 days	Mon 6/16/14	Wed 6/25/14	[Gantt bar]																																																																																			
414	Support of Aquery	252 days	Fri 6/6/14	Wed 5/20/15	[Gantt bar]																																																																																			
415	Expand Aquery Functionality	22 days	Mon 6/1/15	Tue 6/30/15	[Gantt bar]																																																																																			
416	AQueryH - Historical Detail Circulation Capture	45 days	Mon 6/1/15	Fri 7/31/15	[Gantt bar]																																																																																			
417	AQueryH - Data Extract	22 days	Mon 6/1/15	Tue 6/30/15	[Gantt bar]																																																																																			
418	Network Environment & Systems Support	22 days	Fri 8/1/14	Sun 8/31/14	[Gantt bar]																																																																																			
419	Support August Data Extracts	22 days	Fri 8/1/14	Sun 8/31/14	[Gantt bar]																																																																																			
420	Third Party Analysis	79 days	Mon 9/29/14	Thu 1/15/15	[Gantt bar]																																																																																			
421	Survey	13 days	Mon 9/29/14	Wed 10/15/14	[Gantt bar]																																																																																			
422	Provide API Assistance	54 days	Mon 11/3/14	Thu 1/15/15	[Gantt bar]																																																																																			
423	Third Party Integrations	291 days	Mon 8/25/14	Wed 9/30/15	[Gantt bar]																																																																																			
424	Form a Team	11 days	Mon 8/25/14	Fri 9/5/14	[Gantt bar]																																																																																			
425	Triage the Work - P	23 days	Mon 9/15/14	Wed 10/15/14	[Gantt bar]																																																																																			
426	Identify Resources	11 days	Fri 10/17/14	Fri 10/31/14	[Gantt bar]																																																																																			
427	Develop Testing Plan	11 days	Thu 10/23/14	Thu 11/6/14	[Gantt bar]																																																																																			
428	Z39.50 integration	20 days	Mon 11/17/14	Fri 12/12/14	[Gantt bar]																																																																																			
429	SpineOMatic	20 days	Mon 11/17/14	Fri 12/12/14	[Gantt bar]																																																																																			
430	SIP (La Crosse)	86 days	Mon 11/17/14	Fri 3/13/15	[Gantt bar]																																																																																			
431	FTP Server	24 days	Mon 11/17/14	Thu 12/18/14	[Gantt bar]																																																																																			
432	RapidILL (Madison)	71.98 days	Mon 11/17/14	Wed 9/30/15	[Gantt bar]																																																																																			
433	Uborrow (Madison)	57.92 days	Mon 11/17/14	Wed 5/20/15	[Gantt bar]																																																																																			
434	Library Course Pages (Madison)	62 days	Mon 12/15/14	Mon 3/9/15	[Gantt bar]																																																																																			
435	Generation Fifth LAS (Madison)	92 days	Mon 11/24/14	Mon 3/30/15	[Gantt bar]																																																																																			
436	Bursar Functionality to PeopleSoft	21 days	Mon 6/1/15	Mon 6/29/15	[Gantt bar]																																																																																			
437	Bowlers Books (Stevens Point)	22 days	Mon 6/1/15	Tue 6/30/15	[Gantt bar]																																																																																			
438	Hathi Trust Exports (Madison)	43 days	Mon 8/3/15	Wed 9/30/15	[Gantt bar]																																																																																			
439	CIC Shared Print Repository	43 days	Mon 8/3/15	Wed 9/30/15	[Gantt bar]																																																																																			

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UW System Library Service Platform Project

ID	Task Name	Duration	Start	Finish	Timeline																														
					April 2014	July 2014	October 2014	January 2015	April 2015	July 2015	October 2015																								
464	Purge Voyager Patrons	11 days	Wed 4/1/15	Wed 4/15/15																															
465	Patron Processing	5 days	Thu 5/21/15	Wed 5/27/15																															
466	Patron Group Mass Updates	6 days	Wed 5/20/15	Wed 5/27/15																															
467	ILLiad Patron P	42 days	Wed 5/20/15	Thu 7/16/15																															
468	ILLiad ETL	6 days	Wed 5/20/15	Wed 5/27/15																															
469	ILLiad Match Points	6 days	Wed 5/20/15	Wed 5/27/15																															
470	ILLiad Patron Ingest	42 days	Wed 5/20/15	Thu 7/16/15																															
471	Legacy System Retirement	112 days	Wed 3/4/15	Wed 8/5/15																															
472	Legacy Retirement Plan	43 days	Wed 3/4/15	Thu 4/30/15																															
473	Legacy Access	43 days	Wed 3/4/15	Thu 4/30/15																															
474	Legacy Archive Creation	1 day	Wed 8/5/15	Wed 8/5/15																															
475	Data Acceptance Testing & Risk Assessment	78 days	Tue 2/3/15	Tue 5/19/15																															
476	Lessons Learned from Test Load	17 days	Mon 2/16/15	Tue 3/10/15																															
477	Acceptance Testing Protocol Development	42 days	Tue 2/3/15	Tue 3/31/15																															
478	Post Testing Assessment - Resource Sharing & Eshelf	12 days	Mon 3/16/15	Tue 3/31/15																															
479	April: Review Release Notes	11 days	Mon 3/23/15	Mon 4/6/15																															
480	Functionality Acceptance Sign-Off	1 day	Tue 4/7/15	Tue 4/7/15																															
481	May: Review Release Notes & Confirm Issue Resolution	1 day	Mon 5/4/15	Mon 5/4/15																															
482	Customer Data Acceptance Testing	2 days	Mon 5/11/15	Tue 5/12/15																															
483	Testing - Clean Patron, Loan & Request Data	1 day	Tue 5/19/15	Tue 5/19/15																															

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Task Split Milestone Summary Project Summary External Tasks External Milestone Deadline Progress

UW System Library Service Platform Project

ID	Task Name	Duration	Start	Finish	Timeline																																															
					April 2014	July 2014	October 2014	January 2015	April 2015	July 2015	October 2015																																									
484	Verify Primo	1 day	Tue 5/19/15	Tue 5/19/15	[Timeline visualization]																																															
485	Post Go-Live	264 days	Tue 9/30/14	Wed 9/30/15	[Timeline visualization]																																															
486	Develop ER Shared Practices	10 days	Wed 5/20/15	Tue 6/2/15	[Timeline visualization]																																															
487	Piece Counts	114 days	Tue 9/30/14	Fri 5/29/15	[Timeline visualization]																																															
488	Archive & Retire Team Wiki Area	5 days	Mon 7/13/15	Fri 7/17/15	[Timeline visualization]																																															
489	Project Close Activities	13 days	Wed 7/1/15	Fri 7/17/15	[Timeline visualization]																																															
490	Locally Enhanced Records	23 days	Mon 6/15/15	Wed 7/15/15	[Timeline visualization]																																															
491	Data Cleansing	22 days	Tue 9/1/15	Wed 9/30/15	[Timeline visualization]																																															

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UW System Library Service Platform Project

4 Establish Budget Process

Owner: Susan Mitchell (UW System Administration) & Paula Sumpster

5/27 - Paula: Met with Susan at her invitation. Susan (System) owns and manages the budget. She gave an overview of the project budget and explained that as of 7/1/14, the funding for the line items under Project Management & Training will be transferred to UW. She suggested Paula meet with Karen Le Meer to discuss process for purchasing and reporting. Susan requests a monthly report from either Karen or Paula.

5/28 - Paula: Met with Mitch and recapped the meeting with Susan. Discussed the transfer of funds. Mitch would like to be at the meeting with Karen. Paula will schedule in advance of the end of the fiscal year.

6/11 - Paula: (Meeting included: Mitch, Lee, Karen and Paula) Discussed process for the funds transfer and purchasing after 7/1. Take-aways- Lee will meet with Susan to review the transfer timing, discuss reporting frequency, and inquire as to who will be managing the System portion of the project budget after her departure. Karen will provide reporting to System.

6/23 - Sent follow-up email to Lee requesting update on his meeting with Susan.

6/24 - Lee: The interim person has not yet been chosen. Susan will facilitate the transfer with Karen on 7/1. Lee will follow-up by scheduling another UW meeting (Lee, Mitch, Paula, Karen) in July.

5 Quarterly Reporting

Owner: Paula Sumpster

9/30 - Received request from Lee Konrad to provide a quarterly budget report for 9-12-14 in January. Will work with Dave Waugh and Cate to collect info and provide the report to Karen Lamere.

1/5 - Worked with Karen and David Waugh to establish that there were no expenses other than salaries to be charged against the project for the previous quarter.

6 Vendor Payments

Owner: Steering Committee

Goal: Approve all payments to project vendors.

7 Final Project Accounting

Owner: Steering Committee

Goal: Provide final project accounting information to UW System.

8 Budget Closure

Owner: Steering Committee

Goal: Review and approve UW System project accounting prior to close of the annual and project budgets.

10 Legacy Retirement Plan

Owner: Steering Committee

Goal: Review, provide input, and approve the Legacy System Retirement Plan prepared by the Tech Data Team, Project Manager, and Project Director.

3/2: Mitch: Action items:

Mitch write up plan with following information to clear with Steering and then for general publication:

-Confirm the planned shutdown of Voyager access on 6/26

-Confirm the decommissioning of Voyager servers on July 20th

-Establish a contingency date of August 20th if necessary

-Clarify access methods for non-migrating data (circ history, historical fines, etc.)

-Solicit feedback from staff about potential needs for Voyager access post go-live.

-Define "active copy of Voyager" versus "archival copy of Voyager" clarifying ease of access for the former and not the later.

Plan for systematic gathering of feedback of ongoing Voyager access needs from 5/20-6/26.

Follow up with Brian Wilson, Tim Lehman and Kay Gehrke on Voyager read-only configuration.

Follow up with Brian Wilson, Tim Lehmann and Kay Gehrke on potential Voyager logging of staff client use.

Work with Madison technical staff, reports group and staff to identify needs for reports server (FIBR) access post go-live.

5/26 - Mitch: Need a retirement plan. 2 components - non-migrating data and decom of the voyager server. Tech Data will not work the non-migrating data piece. Steve Meyer has address some of these issues. Have an update from him. Will follow up on his update. Bruce is out this week. Need to share this status report with the campus reps for review - does this meet their needs. Will bring in Jay to work with Steve to take the next step. Need to consolidate and communicate the summary to stakeholders. Will do this by the end of this week. Decom: Tim is providing daily reports of daily Voyager sessions. Brian has not provided reports, but says he will start. 80 sessions yesterday - what does that mean? Working this analysis. Need to communicate "why are you accessing Voyager?" to the campuses. Perhaps create a survey. Paula will contact Maureen about creating a survey and getting her input.

11 Legacy Access

Owner: Steering Committee

Goal: Review, provide input, and approve the Legacy System Access plan prepared by the Tech Data Team, Project Manager, and Project Director. This plan will establish legacy access needs through cutover and until Voyager is shut down.

3/5 - Mitch: Discussion in Tech Data - is there data that needs to be retained? May generate these requirements post go-live? When do we develop the means to retain the data.

3/24 - Email from Mitch: Per Bruce, rationale for retaining access to data can be categorized as follows:

-We need data that don't migrate

Per non-migrating data group, we will be retaining the following data via AQuery:

Anonymized circulation data along with bib/holdings/items as they stood at migration

Access to historical fines data in a simple web application available to circulation staff

Post migration reports as identified by non-migrating data group (ID these ??)

-We see weird data in Alma and want to know why.

Difficult to anticipate exact need here.

Tentative plan is to announce that client access to Voyager will end on 6/26 (see legacy retirement plan)

Solicit feedback regarding how staff anticipate and/or are still utilizing Voyager.

-We need to abandon Alma after a couple of disastrous days or weeks

Voyager environment is retained for requisite period of time for fallback.

5/27 - Mitch: Will not need legacy access to Voyager. Will need access to some extracted data, but will not keep Voyager around. Issue is access to the extracted data. Need clear communication of what extracted data will be available from Tech Data. (fines, circ history) Also need to clarify what data will not be extracted/provided for future use. Steve's update helps to begin to clarify this. Will follow up this week with Steve's report.

12 Legacy Archive Creation

Owner: Steering Committee

Goal: Review, provide input, and approve the recommendation of the Tech Data Team and Project Director to create and store an archive of legacy data and establish access procedures.

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3/24 - Mitch: Action items:

-Discuss with Steering any need to retain Voyager data for records retention, etc (I don't believe there is).

-Work with Tech/Data and Sysadmins to determine final disposition of Voyager database.

14 Post Go-Live Roles

Owner: Steering Committee

Goal: Define post go-live roles for project teams and participants.

5/27 - Mitch: Steering is discussing, Communication of issue reporting processes and how we will support until new governance takes over on 7/20.

15 Post Go-Live Meeting Schedule

Owner: Steering Committee

Goal: Review, give input, and approve the post go-live meeting schedule recommended by the Project Director and Project Manager.

5/27 - Mitch: Meeting schedule is defined until 7/20 governance change.

16 Post Go-Live Issue Resolution

Owner: Steering Committee

Goal: Define ongoing processes for campuses to report Alma issues internally and to the vendor.

5/27 - Mitch: Redmine is in place for issue reporting, Mitch is prioritizing issues with EL. Discussing Redmine for use in managing change management issues. Need to initiate compliance. Will raise this in Strategy on Thursday.

17 Alma Governance Process

Owner: Steering Committee

Goal: Define the post-project Alma governance process; Form an Alma governance team; establish role and scope; Define process for campuses to engage in issue resolution with the vendor; Define date when the process will take over this responsibility from the project implementation team.

5/27 - Mitch: Proposal is completed and in front of CUWL. Will be discussed 6/2.

19 Document Retention

Owner: Steering Committee

Goal: Determine what, if any, project documentation is subject to existing UW System retention policies/procedures and comply.

20 Wiki Archive Access

Owner: Steering Committee

Goal: Review, provide input, and approve the recommendation of the Project Director to establish Wiki archive access requirements and procedures. Archive begins on 7/13/15.

22 Define Sign-Off Process

Owner: Steering Committee

Goal: Review, provide input, and approve the Project Director's recommendation to define a product delivery sign-off process.

5/27 - Mitch: Initial sign off took place at go-live. Final sign-off is defined by the close punch list.

23 Pre-Close Status Review

Owner: Steering Committee

Goal: Review resolution of any outstanding contractual issues and/or questions

25 Acknowledge Participants

Owner: Steering Committee

Goal: Acknowledge the contributions of the functional Teams and Alma Implementers.

26 Approve Project Close

Owner: Steering Committee

Goal: Monitor vendor project close process; Approve vendor project close and transition to service contract (support mode).

27 Final Project Report

Owner: Steering Committee

Goal: Review, provide input, and approve the final project report prepared by the Project Director. Circulate this report as appropriate.

28 Disband Teams

Owner: Steering Committee

Goal: Approve the Project Director's recommendation to disband the project's functional teams and implement the Alma governance procedures.

29 Approve Release the PM Position on 7/31

Owner: Steering Committee and UW Memorial Library Administration/Human Resources

Goal: Approve the Project Director's recommendation to release the Project Manager position on 7/31.

30 Approve Release the PD Role

Owner: Steering Committee and UW Memorial Library Administration

Goal: Upon the implementation of the Alma governance procedures, release the Project Director from the project leadership role and return him to his pre-project responsibilities.

31 Disband the Steering Committee

Owner: Steering Committee and UW System Administration

Goal: Upon the implementation of the Alma governance procedures, release the members of the Steering Committee from the project leadership role.

32 Kick-Off Event

Owner: Ex Libris, Mitch Lundquist

5/8 - Event - all day.

33 Prepare Project Management Docs

Owner: Paula Sumpter

34 Document Project Timeline

Owner: Paula Sumpter

5/14 - Prepared timeline based on implementation schedule from Ex Libris. Vetted through Mitch.

5/21 - Vetted through the Steering Committee and posted to the wiki.

35 Define Organizational Structure

Owner: Paula Sumpter

5/21 - Created updated org chart. Vetted through Mitch. Posted approved org chart to the wiki.

36 Complete Charter

Owner: Paula Sumpter

5/19 - Paula drafted a charter.

5/22 - Vetted draft through Mitch. Minor edits were made. Mitch put it on that day's Steering Committee agenda. Paula posted to the SC wiki for review.

5/22 - Charter draft distributed to Steering Committee. Discussion resulted in minor edits. Approval postponed until next meet as all some did not have an opportunity to review it.

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5/29 - Meeting cancelled. Placed on next agenda.
6/4 - Charter approved with no changes. Posted to the Project Documents area of the wiki.

37 Complete Communications Plan

Owner: Paula Sumpter

5/19 - Prepared communications flow chart and Standing Meeting schedule and vetted through Mitch.
5/21 - Vetted the flow chart and meeting schedule through the Steering Committee and posted to the wiki

38 Complete Draft Project Plan

Owner: Paula Sumpter

Prepare a draft plan and post to the wiki. Draft should include: Project Admin = 80% complete and Functional Teams = First pass - initial meeting with each FC and begin adding their action items. Post for review. Continue to populate action items for next 2 weeks.

5/28 - Began scheduling meetings with Functional Team Chairs. Prepared Gantt template.
5/30 - Met with Adriana and Mitch. Discussed the EL deployment plan with Adriana who indicated she would forward her completed Gantt to Paula by 6/5. After receiving the Gantt and incorporating it into the UW System plan, Paula will schedule a call with EL to review and codify mutual action items. The last 60 minutes of future Monday EL project meetings will be used to update mutual action items throughout the project.
6/2 - Initial planning meeting with Bruce Barton
6/3 - Initial planning meeting with Jackie Crinion
6/4 - Initial planning meeting with Dineen Grow
6/5 - Expected Ex Libris Gantt - Adriana indicated last Friday it would be delivered to Paula by 6/5. Received email from Adriana indicating it would be late. New eta: 6/7. Began populating Project Admin portion of the plan.
6/7 - (Saturday) Received EL deployment plan. It contained no notes. Some dates do not correspond with their other documentaion UW had received from EL. Review meetings will be required.
6/9 - Printed and delivered EL deployment plan to Mitch for review.
6/11 - 1:1 call w/Adriana: Reviewed training portion of the EL deployment plan - updated dates, clarified action items. Requested meeting to review the remainder of her Gantt. Scheduled for 6/13. Paula prepared a training timeline and posted to the wiki. Sent a copy of the timeline doc to Adriana for her review and comment.
6/13 - Received email from Adriana requesting 2003-2010 version of the timeline doc. Sent both Visio and PDF versions to Adriana.
6/13 - Call w/Mitch & Adriana: Completed review of 2 portions of the EL Gantt - Configuration and Migration. Discussed action items and updated dates for lines 71-91. Adriana will deliver an updated Gantt to Paula by 6/17. Paula brought up cutover strategy (not on the EL Gantt). Adriana indicated they are tracking cutover elsewhere and has promised to deliver a preliminary cutover plan to Paula by 6/17. This plan will not be complete. Adriana also agreed to deliver a cutover "guidelines to the customer" document to Paula by 6/17. Paula will schedule a follow-up meeting to discuss the remainder of the EL PP next week after 6/17.
6/13 - Initial planning meeting with Craig Thomas.
6/16 - Initial planning meeting with Katie Sanders
6/17 - Initial planning meeting with Susan Foran
6/17 - Adriana email: Received updated EL gantt (Updated Config and Mig sections only) and the "guidelines to the customer" document.
6/18 - Initial planning meeting with Ann Hanlon
6/18 - Mitch: Reviewed existing draft and made some additions to the plan.
6/18 - Follow-up planning meeting with Bruce - wiki down, worked issues that have been completed and discussed Mitch's additions to the T/D plan.
6/19 - Adriana email: Received a EL cutover template not yet customized for UW.
6/19 - Received email from Criag with new planning items attached. Follow-up call.
6/19 - Bruce: Met to complete yesterday's updates.
6/19 - Call w/Mitch & Adriana: Discussed EL deployment plan through line 168. Some date changes need to be made and Adriana will be adding a section before line 92 outlining a pre-migration extract for purpose of completing the migration forms. Adriana will deliver updated chart to Paula on Tuesday, 6/24. Also discussed again the imminent need for a migration meeting between our Tech/Data team and EL. Adriana agreed to schedule the meeting for next week and to have an invitation to us by Monday, 6/23. One more deployment plan review meeting will be necessary. Paula will schedule for late next week.
6/19 - Posted review draft PDF to the wiki. Blogged the instructions for review and submission of changes/additions.

39 Launch Working Project Plan

Owner: Paula Sumpter

Complete adding of action items (except for project-driven changes).

6/25 - Received email from Adriana cancelling remaining EL deployment schedule meeting for the 26th. Meeting rescheduled by Mitch as on-site on 7/3.

7/3 - Meeting w/ Mitch, Adriana, Paula: Adriana arrived with a new project schedule. We were not aware changes were coming. The schedule includes a new extract and thereby compresses the old schedule by 6 weeks. Adriana provided a draft high-level plan (one page Word document) that she edited during the meeting. Meeting lasted 3 hours. Mitch showed the new schedule at the S&WF meeting to inform them of the changes and to announce that the migration forms for the 3 test campuses would now be due to EL on 7/16 instead of 7/23. Adriana did not have a new gantt of the deployment schedule. Agreed to provide by COB on Monday, 7/7. This change and the previous meeting cancellation on the part of EL have caused this action item to fall behind schedule.

7/7 - Email from Adriana: 8:45 pm Paula received the updated gantt. Not all items were updated, including the configuration process. Some lines have been removed from previous drafts.

7/8 - Sent email to Adriana requesting update of the configuration process portion of her gantt by today. Printed the gantt for Mitch to review and discussed strategy for using this document to complete the UW System project plan. Received updated Gantt from Adriana. Distributed a flow chart (planning process) to Mitch- approved - he sent to SC for Wed meeting discussion.

7/9 - Sent email to FTCs (discussion with Mitch yesterday) outlining their role in the final planning process and asking them to be prepared for step 1 on Thursday (first pass - areas of team responsibility).

7/10 - Mitch: Steering Committee agreed yesterday to allow the planning process to proceed as defined for the next month - during which the new EL deployment schedule will be analysed and the UW System plan will be completed. Changing the completion date for this action item from 7/3 to 8/8.

7/11 - Updated Configuration and Migration sections to conform to new schedule.

7/29 - Received ver 6 of the deployment plan from Ex Libris. Adjusted the UW plan.

40 Online Communications Dev. & Maint.

Owner: Paula Sumpter

41 Review Existing Wiki

Owner: Paula Sumpter

5/9 - Mitch contacted Bruce and Curran to schedule wiki review meeting for 5/12.

5/12 - Met with Bruce and Mitch to view the existing wiki.

5/14 - Obtained access to the wiki and reviewed content. Began creating new organizational structure and evaluating potential to cover various communications needs.

42 Wiki Training

Owner: Paula Sumpter

5/14 - Obtained access and began reviewing online manual.

5/21 - Email with Erik Straavaldsen to schedule a tutorial with DoIT.

5/28 - Wiki tutorial with Josh Harder.

43 Build Organization and Initial Content

Owner: Paula Sumpter

5/14 - Obtained access to the wiki and began review of existing content and structure. Began editing.

6/3 - Presented new wiki space at the All Reps meeting.

44 Wiki Administration & Support

Owner: Paula Sumpter

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Maintain and update the wiki daily as required for the duration of the project. Provide support to project team members.

45 Alma KB Design and Launch

Owner: Paula Sumpter, David Waugh, Lisa Haller

1/20 - KB basic design is up. Announcing URL in the All Reps meeting today. FTCs and Madison are posting documents.
1/26 - David sent out written instructions to team.

46 Wiki Document Transfer, Archiving & Shut-down

Owner: Paula Sumpter

1/21 - Transfer/copy all ongoing productoin information to the KB, archive and shut down the project wiki.

47 Configuration Forms

Owner: Mitch Lundquist, All Reps

Complete the EL Configuration forms, review responses, and deliver to EL on schedule.

48 EL Form Template Delivery

Owner: Ex Libris

6/13 - Paula: verified with Mitch that he received this on 5/12/14 - questionnaire and guide.

49 EL Configuration Workshop

Owner: Ex Libris, Mitch Lundquist

5/28 & 29 - On-site event - all day. Workshop to discuss configuration issues. EL staff gave presentations and UW reps submitted questions/issues for EL review and resolution.

50 Complete Matrix

Owner: Mitch Lundquist

6/6 - Paula and Mitch met to discuss how to assist reps with the completion of the form. Paula drafted a matrix and vetted it through Mitch.
6/11 - Mitch: Will complete the matrix himself and present it at the All Reps meeting on 6/17.
6/12 - Discussed the matrix with the FCs. They agreed it would be helpful and provided feedback to Mitch regarding content.
6/16 - Mitch: will complete by tomorrow and give to Paula to post to the wiki and discuss in the All Reps meeting on Tuesday.
6/17 - Matrix posted to the wiki and presented to the All Reps meeting.

51 FTC Data Gathering

Owners: Functional Team Chairs

6/12 - FTC meeting: FTCs agreed to this time period to: research questions with all reps and prepare recommendations.

52 FTC Recommendations Delivered

Owners: Functional Team Chairs

6/12 - FTC meeting: FTCs agreed to this delivery date for their recommendations. Delivery to Mitch Lundquist by Noon.

53 Campus Review of FTC Recommendations

Owners: Campus Reps

6/12 - FTC meeting: All present agreed that one week was sufficient time for campus rep review of the FTC recommendations.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

54 Campus Feedback Due on Wiki

Owners: Campus Reps

6/12 - FTC meeting: All present agreed on this delivery date. Responses from all campus reps must be returned to Mitch Lundquist by Noon.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

55 FTCs Deliver Updated Recommendations to PD

Owners: FTCs

Re-submit any recommendations which were affected by the campus feedback.

56 Campus Reps Complete Forms

Owner: Campus Reps

5/29 - Reps had opportunity to interact directly with EL with questions/issues.
6/16 - Mitch: Would like to have the Campus reps submit completed forms 1 week prior to delivery to EL. This will allow him to review the responses and have any necessary conversations with campus reps prior to delivery to EL. Deliver forms with the "campus only" (as indicated on the matrix on the wiki) tabs completed. Paula adjusted process steps/action items to document this change.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

57 Campus Reps Deliver Forms to PD

Owner: Campus Reps

6/16 - Mitch: Would like to have the Campus reps submit completed forms 1 week prior to delivery to EL. This will allow him to review the responses and have any necessary conversations with campus reps prior to delivery to EL. Deliver forms with the "campus only" (as indicated on the matrix on the wiki) tabs completed.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.
8/13 - Mitch: All initial and corrected config forms have been submitted to Mitch.

58 Steering Committee Review

Owners: Steering Committee

6/12 - FTC meeting: All present agreed on this duration for the SC to consider consortial issues and deliver decisions. This time period includes two scheduled SC meetings. As a SC member, Mitch will document all decisions at the meeting on the 23rd.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

59 Notify All Reps of Consortial Decisions

Owner: Mitch Lundquist

6/12 - FTC meeting: All present agreed on this date for delivery to All Reps.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

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60 PD Delivers Forms to EL

Owner: Mitch Lundquist

6/12 - FTC meeting: All present confirmed that this delivery date meets with the EL requirement to deliver the forms to them by 7/31/14.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

61 Migration Forms

Owners: Mitch Lundquist, Functional Team Chairs

Complete the EL Migration forms, review responses, and deliver to EL on schedule.

62 Generate Migration Form

Owner: Mitch Lundquist and Brian Wilson

6/16 - Mitch: Brian must auto generate the form by tomorrow. This will make forms available with pre-population. Mitch will convey process for which parts of the form need to be completed by which campuses/functional teams. Generates a pre-populated spreadsheet that includes Voyager data and facilitates the mapping of those values into Alma values. Mitch will distribute this to the FTCs and campus reps on 6/18.
6/17 - Mitch: Waiting on FTP credentials. Extract failed. EL is working the issue.
6/19 - Mitch: Still do not have the capability of generating the form. Issues are being worked by Brian and Mitch.
6/24 - Extract was successful two days ago. Mitch forwarded forms to Paula today. Paula posted to the wiki and sent out instructions for the campus reps. Complete.

63 Communicate Instructional Matrix

Owner: Mitch Lundquist

6/16 - Mitch: will review generated form and convey instructions to all reps.
6/16 - Mitch: Will discuss process and schedule at the FTC meeting scheduled for this Thursday. Paula put on the agenda and sent an email to the FTCs so they would be prepared. Schedule will be completed at that meeting.
6/19 - Mitch: Bulk of the work is in the initial questionnaire tab. Need to define who should be completing specific tabs and line items. Will create a matrix.
6/20 - Mitch completed the matrix and Paula posted to the wiki with an explanatory blog entry. Complete.

64 FTC Data Gathering

Owner: Mitch Lundquist & Functional Team Chairs

6/19 - FTC meeting: Will look at the specifics of the form.

65 Recommend Naming Conventions

Owner: Functional Team Chairs

6/16 - Mitch: FTCs will develop recommendations for naming conventions and vet to the campus reps. If there is a consensus, there will be no need to vet through the Steering Committee.
6/19 - FTC meeting:

66 FTC Recommendations Delivered

Owner: Functional Team Chairs

67 Campus Review of FTC Recommendations

Owners: Campus Reps

6/12 - FTC meeting: All present agreed that one week was sufficient time for campus rep review of the FTC recommendations.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

68 Campus Feedback Due on Wiki

Owners: Campus Reps

6/12 - FTC meeting: All present agreed on this delivery date. Responses from all campus reps must be returned to Mitch Lundquist by Noon.
7/8 - Mitch: sent email informing reps of EL project schedule changes and corresponding due date changes for the forms.

69 FTCs Deliver Updated Recommendations to PD

Owners: FTCs

Re-submit any recommendations which were affected by the campus feedback.

71 Re-Generate Migration Forms for Test Campuses

Owner: Mitch Lundquist, Brian Wilson, Tim Lehmann

7/9 - Brian is scheduled to generate 7/9. Previous attempt failed. Tim has Salesforce case open on this. Has updated the case to tell them we need it today and do not want to wait for the weekend. Brian's work is completed and Mitch has them and will distribute to test campuses. Madison's is not done, RF and MKE are done.

72 Campuses Complete Test Migration Form

Owner:

Mitch will take the forms from the wiki at COB.

74 Pre-Migration Extract - EL

Owner: Ex Libris, UW Systems Support

8/5 - Several issues and delays have caused it to be necessary to have EL do the extract for Madison in a test environment. It was successful today. Now EL is working on MKE. No word yet on resulting timeline changes.

8/20 - Delivered.

75 Steering Committee Review

Owner: Steering Committee

6/16 - Mitch: This may not be necessary unless there is no consensus re: naming conventions.

76 Notify All Reps of Consortial Decisions

Owner: Mitch Lundquist

77 All Reps Complete Mig Forms (Except Test Campuses)

Owner: All Reps

6/24 - Paula posted forms to the wiki and made them available to the campus reps. Emailed Adriana requesting a blank form to distribute to the FTCs.

78 All Reps Deliver Mig Forms to PD for Review (Except Test Campuses)

Owners: Functional Team Chairs & Campus Reps

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Reps must deliver their completed forms to Mitch by Noon.

80 September Alma Release

Owner: Ex Libris

7/10 - Email from Adriana confirmed release date.

81 September Forms Extract

Owner: Mitch Lundquist, Brian Wilson, Tim Lehmann

8/29 - Email

Hi Mitch:

Let me check with Migration Team about the auto-extract script...

The migration forms do not change much from release to release..

Thanks, Adriana

Adriana Pilecky-Dekajlo

adriana.pilecky-dekajlo@exlibrisgroup.com

Director, Project Management

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From: Mitch Lundquist [<mailto:mlundquist@library.wisc.edu>]

Sent: Thursday, August 28, 2014 5:18 PM

To: Adriana Pilecky-Dekajlo; Paula Sumpter

Subject: Re: New migration forms next week

Is this the earliest we can get it? This would only give us four days to review, vet with campuses, make any requisite edits and return to ExLibris. We were planning on having 2.5 weeks for this. Four days won't be enough time if there are changes to the form.

-mitch

9/8 - Ex Libris Meeting - Mitch lead question. There was postponment from EL about the forms extract, but they said in this meeting it can be done now. Mitch asked to extend the deadline re: the delay, but EL felt it was not warranted. Advised copy/paste to new form and indicated to Mitch where new info would be required.

9/16 - Completed and being reviewed and distributed.

82 All Reps Transfer Data & Complete Mig Form

Owners: All Reps, Mitch Lundquist

84 All Reps Deliver Final Mig Forms to PD

Owner: All Reps, Mitch Lundquist

85 PD Delivers Forms to EL

Owner: Mitch Lundquist

86 Third Party Integration Forms

Owner: Mitch Lundquist, Campus Reps

87 Campuses Complete Forms

Owner: Mitch Lundquist, Campus Reps

7/25 - Mitch distributed forms to each of the campuses.

8/13 - Mitch: All forms have been submitted to Mitch.

88 Training

Owner: Ex Libris, All Campuses, All Reps

89 Core Training Videos

Owner: Ex Libris, All Campuses, All Reps

90 Orientation & Concepts

Owner: Ex Libris, Mitch Lundquist, All Reps

Complete the posted videos by the milestone date.

91 Navigating & Searching

Owner: Ex Libris, Mitch Lundquist, All Reps

Complete the posted videos by the milestone date.

92 User Management

Owner: Ex Libris, Mitch Lundquist, All Reps

Complete the posted videos by the milestone date.

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- 93 Fulfillment**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 94 Resource Management**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 95 Additional Training Videos**
Owner: Ex Libris, All Campuses, All Reps
- 96 EL Delivery of Content**
Owner: Ex Libris
6/11- Call with Adriana: These videos are in production and not currently available. Delivery expented at the end of June.
- 97 Acquisitions Fundamentals**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 98 Managing Funds and Payments**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 99 More Resource Management**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 100 Acquiring Print Material**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 101 Electronic Resource Fundamentals**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 102 Alma & Primo**
Owner: Ex Libris, Mitch Lundquist, All Reps
Complete the posted videos by the milestone date.
- 103 Administration Fundamentals Videos**
Owner: Ex Libris, All Campuses, Instance Admins.
- 104 EL Delivery of Content**
Owner: Ex Libris
6/11- Call with Adriana: These videos are in production and not currently available. Delivery expented at the end of June.
- 105 Intro & Organizational Structure**
Owner: Ex Libris, Instance Admins.
For Instance Admins only. Complete the posted videos by the milestone date.
- 106 User Management**
Owner: Ex Libris, Instance Admins.
For Instance Admins only. Complete the posted videos by the milestone date.
- 107 Fulfillment Infrastructure**
Owner: Ex Libris, Instance Admins.
For Instance Admins only. Complete the posted videos by the milestone date.
- 108 Resource Management**
Owner: Ex Libris, Instance Admins.
For Instance Admins only. Complete the posted videos by the milestone date.
- 109 Acquisitions Infrastructure**
Owner: Ex Libris, Instance Admins.
For Instance Admins only. Complete the posted videos by the milestone date.
- 110 Live Web or On-Site Events**
Owner: Ex Libris, Mitch Lundquist, All Reps
- 112 Alma Analytics**
Owner: Ex Libris, Mitch Lundquist, All Reps
- 113 Network Zone**
Owner: Ex Libris, Mitch Lundquist, All Reps

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- 114 Alma Workshop**
Owner: Ex Libris, Mitch Lundquist, All Reps
6/16 - Ex Libris Meeting: All agreed that the meeting would take place at UWM. 9/23-24=Tech Services; 9/25-26=Fulfillment.
- 115 Certification Course**
Owner: Ex Libris, Mitch Lundquist, All Reps
6/12 - Adrina email: Send a PP presentation overview of the Certification Program. Paula posted the deck to the wiki under Training.
- 116 Campus On-Site Training**
Owner: Ex Libris, Mitch Lundquist, All Reps
- 117 Training Info on the KB**
Owner: Paula
Goal: Transfer ongoing training materials from the wiki to the KB; create necessary new training info for the KB.
2/26: Paula - all wiki info from the training portal has been transferred. Exploring the need for additional training info.
- 119 Functionality Acceptance Sign-Off**
Owner: Mitch
2/20 - Mitch: Functionality tests final sign-off; UW System signs off on starting migration. Bruce will deliver to Mitch by time TBD, Mitch will deliver to Steering and receive approval if necessary and then notify vendor.
- 120 Populate the KB**
Owner: Paula and David Waugh
Goal: Set up and populate the KB with info from the campuses and FTCs. Prepare site management process for Steering approval.
- 122 Cutover Period - (See Tech Data For Details)**
Owner: Mitch, Ex Libris
- 123 Customer Data Acceptance**
Owner: Mitch
2/20 - Accepted data after customer data testing of clean data on prod. Times TBA. Does TS resumein Aloma on 5/13? This is the application of testing protocols by Campus reps. Each campus must test their own data. Meeting with reps on 3/3 to discuss process.
- 124 Go Live**
Owner: Ex Libris, Mitch Lundquist
- 1/9 - From Mitch:** Hello everybody, this message is to notify you all that due to unresolved issues with our Alma migration, primarily related to resource sharing functionality, we will not be migrating on February 16th as currently scheduled. At this time we do not have an alternate go-live date established but expect to have this worked out by next week. It will be no earlier than mid-March and possibly as late as mid-May.
- In the short term this change will require the following:
- Campus contacts and/or LAMs re-enable UB in Voyager Sysadmin:
 - Move UW databases from “Available Databases” to “Selected Databases” (Sysadmin à OPAC Configuration à Request Forms à UB àUB Databases)
 - Re-enable UB requesting within Primo (Sue Dentinger will handle this)
 - Update and/or remove any messages currently displaying within Primo (Sue, along with Discovery team is handling this)
 - Communicate to your campuses that our go-live date has been postponed and that we’ll have more specific information about the new go-live date next week
 - Communicate to your campuses implications for course reserves as appropriate
 - Hold off on migration form work for now
- Resource Sharing Concerns**
- Our decision to forego the February 16th go live date is informed by a considerable amount of detailed and systematic resource sharing testing and analysis by our Discovery and Fulfillment teams along with ExLibris staff. Through this process we’ve identified numerous issues that either demand future code changes or hotfixes or require additional testing in order to effectively diagnose and resolve. While ExLibris has been actively working with us to identify and address these issues, based on the current functionality we’re unable to commit to a migration and subject our users to a potentially dysfunctional resource sharing environment.
- We’re well aware that moving go-live at this late date means that some of the work done over the past week is somewhat wasted. Our hope is that we’ve at least learned some things about UB shutdown, migration forms, etc. that can serve us well when we do in fact migrate. As has been the case throughout the project, your efforts have been extraordinary and are greatly appreciated.
- We apologize for this inconvenience, but feel that based on our final analysis we have little choice but to defer. We remain completely committed to a successful migration and retention of core services and feel that the only way to assure this is to defer until functionality is confirmed.
- If you have questions, concerns or comments about this change in plans, please let me know. Mitch
- 1/20 - Mitch gave 5/27 as our preferred go-live date and 5/20 as the back up to EL. Waiting for their reply.
- 125 Acceptance of Alma Environment**
Owner: Mitch
2/20 - Acceptance of the Alma Environment after customer data testing of clean patron, loan, and request data on prod (4 hours, TBA). Test offline transactions in Alma (1 hour TBA). Fulfillment Team interfaces with Campus Reps (coordinating with their fulfillment staff.) Fulfillment reports to Tech Data. Bruce reports to Mitch for customer acceptance of the Alma environment.
- 126 Acceptance of Primo/Alma**
Owner: Mitch
2/20 - Accept Primo/Alma environment after verification of Primo with full clean data re-published and verify EShelf update if necessary. Can we start on the 18th? Mitch has the question pending with EL. Discovery Team works with campuses. Each campus must test - Campus Reps coordinating with their discovery staff. Testing window deadline time TBA.
- 128 Create Project Close Punch List**
Owner: Mitch, Paula, Tech Data
Goal: Create a project close punch list to correspond to the 7/1-7/17 status review item on the project timeline. Include and define all items that must be reviewed, confirmed or performed during this period, responsible parties, and deadline for completion of all items. Includes final system status review to identify and resolve existing mission-critical issues at all campuses.

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3/18 - Mitch: Open case review and prioritization of those that are defined as core to a successful migration. Also a risk assessment revisited. Review functionality, open tickets, other items that are not SF tickets (ex. patron processing functionality). Functional teams confirming functionality and processes - link to SF tickets where applicable. Identify the stakeholders and determine their input during this period. Solicit feedback to confirm/deny the recommendations of those stakeholders. Schedule feedback from the campus contacts re: the feedback from their patrons. User interface analysis results? Will schedule a brainstorm meeting to begin a rough list.
4/24 - Paula: Met with Mitch to review RACI matrix. Will continue review on Wednesday.

129 Acknowledge Contributions of Team Members

Owner: Mitch

Goal: Solicit input and prepare acknowledgment recommendations from the Project Director. Review with Steering and present at the CUWL meeting on 6/9.
5/27 - Mitch: CM team is working on certificates/mugs/etc... Steering has discussed acknol. of the team chairs and extraordinary efforts. Need further discussion.

130 Obtain Transition Sign-Off

Owner: Mitch

Goal: Obtain transition sign-off from internal support team prior to transitioning to support mode with the vendor.

131 Engage Internal Support Mode

Owner: Mitch

132 PROJECT CLOSE & Transfer to Support

Owner: Ex Libris, Mitch Lundquist, Paula Sumpster

133 Archive & Retire Project Wiki

Owner: Paula and Mitch

Goal: Work with FTCs to migrate ongoing info from the wiki to the KB; houseclean the wiki; archive the wiki and determine access rights.

134 Prepare and Distribute Director's Final Report

Owner: Mitch

Goal: Prepare the final project report from the Director for CUWL, Memorial Library Administration, and UW System.

135 Release the PM Position

Owner: Mitch, UW Memorial Library Administration

137 Acquisitions Team

Team Members:

Jacki Crinion, Chair (Head, Acquisitions, Madison)

Diane Passafaro (Acquisitions, Milwaukee)

Cory Mitchell (Collections Development, Stout)

Joan Robb (Coordinator of Collections, Green Bay)

Tom Reich (Coordinator of Acquisitions/Collection Development, Stevens Point)

138 Configuration Form

Owner: All Team Members

6/30 - Jackie: The team's tasks with the form are: review "libraries" and "printers". Jackie will send survey questions to the alma-wi list. Where do units like ordering and circ reside on the form? (not physical libraries), do we need this? If so, where is that information represented? Where are the organizational unit codes? Questions will be the same for ordering units at any other library as they are for Madison.

7/7 - Jackie: Still surveying about libraries and printers. Some items under General tab apply to Acquisitions. Need to understand what exactly applies to Acq. She will read the guide again to get clarification. Does this include the ordering process? Schedule has changed so this is not behind. Paula will change dates after meeting with Mitch.

7/14 - Jackie: Has reviewed the form and identified the parts that the team will be responsible for. Will move on to this form after the migration form is complete this week. Need to do printers, eresources (manage network groups), acquisitions tab, work orders (routing), about 10 questions on the general tab.

7/21 - Jackie: She will be putting 2 comments on the wiki (recommendations) to remind people what they should put in for lines 8 and 22. Team will meet this week to discuss the tabs. Do not expect a system recommendation to come out of this.

7/28 - Jackie: actually lines 9 and 22. still do not see the need for system recommendations. believe they are pretty well complete.

8/4 - Jackie: Complete except for campus support.

139 Migration

Owner: All Team Members

140 Review Location Codes

Owner: Jackie Crinion

6/3: Jackie: Used in Acquisitions. Resource Mgt and Fulfillment are reviewing existing library and location codes in Voyager and developing recommendations. Acq. needs to know how acq history will be migrated into Alma.

6/30 - Jackie: Not complete. New question: she is composing a note to EL. Physical vs happening locations. Need to know - do we really need to fill this out at all, or if we do, how is the ordering location defined? Is the ordering unit a code? Half are circ codes, so she is going to ask Dineen. Expects a reply from EL before this week's meeting on Thursday.

7/7 - Jackie: EL responded but it wasn't clear. She sent examples with another note to them this morning. Waiting for response.

7/14 - Jackie: Complete. Reviewed them. Only question remaining, will other campuses have questions.

141 Define Ledger Structure

Owner: Jackie Crinion

6/2 - Jackie: Determine if we want to propose a structure that is system-wide in terms of funds and reporting codes.

6/30 - Jackie: Decided to propose a system-wide structure. Meeting with EL on 7/3 to make final decision re: where it will reside. Have already responses from EL and distributed to the team.

7/7 - Jackie: Sent recommendation to Mitch for SC last Thursday. Assuming it will go forward. Need response to complete the Madison migration form.

7/14 - Jackie: Complete. Waiting for response from SC.

142 Assist Campuses - Ledger Structure

Owner: Jackie Crinion

7/7 - Jackie: If recommendations to SC go through, campuses may need assistance in managing their ledger/reporting structure.

7/14 - Jackie: Campus input is coming in.

7/21 - Jackie: Haven't heard any more from campuses. Need to follow up with them. Will send a note out to campus contacts to touch base. All previous comments have been addressed. Contact the team via email or wiki.

7/28 - Jackie: getting more questions. Sent out notes last week about reporting codes. Will bring it up again at the next All Reps meeting. Email went to campus contacts and info is on the wiki.

8/4 - Jackie: Continue to answer questions on the wiki.

8/11 - Jackie: Complete.

143 Retention Requirements

Owner: Jackie Crinion

7/28 - Jackie: added this item. Getting questions about retention requirements. POs and invoices must be kept for 6+current. A lot of campuses want to purge, asking "can we get rid of?" We don't know what they've been doing locally. Need to investigate each campus. Is this non-migrating data? (Bruce) How will this be kept?

8/4 - Jackie: Put a reminder on the wiki and will mention tomorrow at the AR meeting.

8/11 - Jackie: Sent out an email last week. Reminded them of their obligation and that this is how Alma will be set up for retention. Complete.

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144 Define Purchase Order Types

Owner: Jackie Crinion

6/2 - Jackie: Order types will determine how things migrate and how to make them correct after migration. Identify a UW System solution to identify order types - common definition.

6/30 - Jackie: Decision that this will be independent of system - each campus can do as it wishes. Complete.

146 Integration with Campus Accounting Systems

Owner: Jackie Crinion

7/21 - Jackie: All use or are moving to PeopleSoft. (No date established for cutover to PS) Who will need to be involved? Is this feasible? Transmit how we code things to the new system. Alma needs to be able to send the correct electronic data to PS. (and PS to populate Alma, if we want to do that). Acq team are supposed to be looking at webinars and documentation now. Only affects Acq? Campuses have not yet been informed. Will discuss this at this week's FTC meeting.

7/28 - Jackie: Received the form. Team is continuing to look into this.

8/4 - Jackie: Team is looking at this.

8/11 - Jackie: Reviewing the instructions. Questions re: what other campuses might want to do. May have a conversation with Lee. Will this be a System accounting decision or will this be decided at the campus level. Not prepared to do this yet. Some campuses do not want to do it. Is that an option? May go to Steering Committee as a consorsial decision.

8/18 - Jackie: Talked with Lee. He thinks it premature to discuss with SC right now. The team is contacting Madison, Green Bay and Stout accounting offices to ask some preliminary questions.

8/25 - Jackie: Have not heard back from the team members, but will discuss this week.

9/3 - Jackie: The team members have not talked to the accounting offices. Tech/Data also has a 3rd party group. They did a survey and are discussing. This is on the back burner for Acq. for the moment. Will continue to discuss in team meetings.

9/8 - Jackie: Still on hold. Will need to talk with Bruce.

9/15 - Jackie: Did not get a chance to discuss with Bruce. Bruce has set up his team and they plan to meet this week. Will discuss team interaction with Bruce.

9/22 - Jackie: Need more follow up with Bruce. The team did meet. Jackie knows that some of the documentation is incorrect for immediate at go live, so needs to discuss this with the group.

9/29 - Jackie: Bruce's group will meet this week. Bill will report back. Nothing new from last week.

10/6 - Jackie: Bill is the contact to Bruce's group for this. Working with the vendor record id information - does not migrate to Alma and that group is working with this. Need a report at cutover.

2/3 - Jackie: Cannot continue with this until after go-live. Need to bring in other resources as well.

2/16 - Jackie: Met with Adriana last week. Some things are fixed, but there are still issues. Working with Katie about a Colleges issue. Sent another note to Adriana with examples of what is still not working. Copied Svetlana.

147 EDI Interfaces With 3rd Party Vendors

Owner: Jackie Crinion

7/28 - Jackie: added this item. Must be working when we go live.

8/11 - Jackie: Most libraries have something in place or want to do this. Jackie will send out a survey to campuses. Then begin to coordinate with vendors. Need to determine the vendor list to contact. Will need to work with Resource Mgt. The data will reside in certain fields - should be the same across campuses.

8/18 - Jackie: The survey has gone out. Have some responses. Gave them until 8/25. Will start working with Ebsco and YBP. Have already been in contact with YBP. Will likely be making specific recommendations to the SC for system-wide use of fields to store data as it is transferred. Will be working with RM Team.

8/25 - Jackie: Still a few schools who have not supplied info. Will send a reminder. Have basic info from YBP and Ebsco and Harrassowitz. Jackie need to contact Susan (RM team) re: MARC fields.

9/3 - Jackie: Going forward with YBP. Contacted RM team. By tomorrow will make a specific recommendation. Will pass that back to Susan for consensus. Then will go to Steering. YBP would like to begin working with campuses in October.

148 Survey Campuses - EDI

Owner: Jackie Crinion

7/28 - Jackie: Survey campuses, who is using EDI and for what purpose? Who are the vendors?

8/4 - Jackie: will do a survey asking campuses which vendors are used for which purposes. Discussed at team meeting last week and will get it out this week.

8/11 - Jackie: Discussed last Friday and will get it out this week.

8/18 - Jackie: Survey is out and due 8/25.

8/25 - Jackie: Due today. Still waiting for EC, Parkside and Superior. Will send a reminder.

9/3 - Jackie: Parkside and Superior have not responded. Will follow up with Mitch, but those 2 schools are probably not doing this. Complete.

149 Embedded Order Data & EOCR

Owner: Jackie Crinion

Make specific recommendations on how to move forward system-wide - use of MARC fields. Coordinating with RM Team.

Vendors: YBP and Baker and Taylor.

9/8 - Jackie: Met last week. Writing up a statement for RM to review and then it will go to SC.

9/15 - Jackie: Have a recommendation for SC. Will send it to them this week to Mitch. Also discussing how the bib records from multiple schools will interact in Alma. Will be discussing with YBP.

9/22 - Jackie: Meeting with EL this week. SC approved the recommendation. Will post it to the wiki and send it to the interest group. One more item will need to be added to the list - reporting codes. Bib records - working with RM and the 3rd party group. How the records come in all at the same time - how does one override the data.

9/29 - Jackie: Trying to set up a meeting with RM. Had meeting with EL and answered some questions. Need to talk with RM re: bibliographic records themselves. Need to get back to YBP early October.

10/6 - Jackie: have contacts with Orbis Cascade. Contacting them first and then RM team.

10/13 - Jackie: Talked with Portland Comm. College and got a lot of information. Will be talking to MN and then going back to YBP releasing them to report to the campuses. Hopefully this afternoon.

10/20 - Jackie: Talked with MN and they confirmed what we know. Will talk to YBP today to release the letters so they can begin working with the tech specs. Complete. Will continue to monitor.

150 Create EOD Import Profiles

Owner: Jackie Crinion

11/3 - Jackie: Info has been distributed to campuses involved. They should respond by 11/17 to YBP.

11/17 - Jackie: Team has communicated to the campuses. Not all of them have responded to YBP. Following up with those who have not. Campuses have to send their data to YBP to complete the tech specs. After, will do the profile. Have not filled out the import profile yet.

11/24 - Jackie: YBP is working on the tech specs. Will verify he has something back from every campus. Made modifications re: dedup - need to test to make sure they are not duplicating each other. Madison is creating an import rule to test in December. Will check with Michael during the testing.

12/1 - Jackie: All campuses have responded. YBP is working on tech specs right now. Madison is working on the import rules for testing.

12/8 - Jackie: Continue to work this. Expect resolution by the end of the week. Karen and Sue are working this.

12/15 - Jackie: RM is revisiting some of the fields. Additional query out to YBP and RM meets Wed to make a final recommendation. Acq meeting Thurs to concur. Need info to YBP on Friday to be ready for go-live.

12/22 - Jackie: There were rule changes, but tech specs did get completed and submitted. YBP has sent out a note to campuses. Still working on import profiles - Bill will review one more time with Karen. Cannot test them until just before go-live.

1/12 - Jackie: Still need to put a draft template on the wiki page. Otherwise, cannot test until go-live.

1/20 - Jackie: No draft yet. Checking with Bill to see if they have all been done.

2/3 - Jackie: Can't do anything until the network zone committee meets to discuss the new mergin and matching rules. Everything else is complete. Will put it up on the wiki by the end of February even if it is not complete.

2/9 - Still don't have a report from the NZ team. Expected by mid February.

2/16 - Jackie: Due date for the NZ team report is 2/27.

2/23 - Jackie: Bill and Karen have been working on the profiles based on Karen's assumptions of what her team is going to report back.

3/2 - Jackie: Draft is complete. Need to review it and post to wiki and KB. Complete

151 Embedded Invoice Data

Owner: Jackie Crinion

9/3 - Jackie: Looking at the process within Alma. Vendors: Ebsco, Swets, Harrassowitz, Hein.

9/8 - Jackie: No progress. Have basic info from Ebsco and Harrassowitz. Guess is that all campuses will need to do this individually, may not be possible to develop a best-practice recommendation.

9/15 - Jackie: No progress. Want to finish YBP order data first.

9/22 - Jackie: YBP will follow through with the embedded order data. Expect it will use the same fields.

9/29 - Jackie: Nothing new this week.

10/6 - Jackie: Need to finish order data first.

10/13 - Jackie: Expect this to be simpler. Three companies to work with after order data is finished.

10/20 - Jackie: In the next test load, would like to try to put the specifications into the profile so we can test is live. Should be ready to test by mid Nov.

11/3 - Jackie: Have info from vendors. Will be contacting both to make sure we have all the instructions. Will fill out the import profile and share with the other campuses so they can use it to fill out their own. The rules should be the same.

11/17 - Jackie: Have basic info from EBSCO. They are visiting this Friday. Also working on Harrassowitz.

11/24 - Jackie: Met with EBSCO on Fri. Working on the import rule. Will test and share it this week. Still need to look at Harrassowitz.

12/1 - Jackie: Have the instructions from EBSCO to manage the EDI setup. Madison is setting up import profile for testing.

12/8 - Jackie: Leia is working on EBSCO. Almost have it done. Expect to finish this week. Initiated the paperwork with Harrassowitz but have not heard back from them. Need their data to dump into the rules.

12/15 - Jackie: EBSCO is up and running. Will write up the rule and share it. Now working on Harrassowitz. We have what we need from them.

12/22 - Jackie: Need to send an email to Adriana to set up the server site for us. Then we can test Harrassowitz.

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1/12 - Jackie: Still need to test this week.
1/20 - Jackie: Started testing. Ran into a snag on codes and working the issue.
2/3 - Jackie: Working on Harassowitz. Issues with the code. Waiting for their reply. Suspect it is simple.
2/9 - Jackie: Still working with Harassowitz. Will contact MN, if they cannot help, will put in a SF ticket.
2/16 - Jackie: No answer yet from MN. Will go ahead and do a SF ticket. Not delaying other action items. Only other school affected is GB.
2/23 - Jackie: Complete.

152 Testing 3 Campus Data

Owner: Jackie Crinion

Mitch is setting up FT members for testing. Plan to share some of the testing protocols that they are developing for Madison with the functional team so they can think about it and look at our data as well.

9/3 - Jackie: Going over the form with the team this week and will post it as a preliminary guide to the other campuses for their testing later. Waiting for more input from MKE about how they are doing their testing.
9/8 - Jackie: Have some input from MKE and RF, no complete reports yet. Have been submitting test cases to EL. Have 3 more to write up. They have found some issues related to money. Have an internal meeting tomorrow related to serials and expect additional questions from that meeting.
9/15 - Jackie: More items to report in on. Getting responses in.
9/22 - Jackie: Testing is complete. Working the tickets in SF.
10/6 - Jackie: have developed a list of queries from voyager to gather data to compare to Alma in the migration. Being entered on the wiki.

153 Testing of Other Campuses

Owner: Jackie Crinion

11/3 - Jackie: Reacting to queries coming from campuses.
11/17 - Jackie: There isn't much in Redmine so far. Only 2 as of last Friday. Keeping up with comments from campuses.
11/24 - Jackie: Many comments. Major issues with reporting codes. SF ticket in. Also fund codes. These are campus-specific. Reviewing them and may push them out to EL to work directly with the campuses. Next testing: financial info for accounting systems.
12/1 - Jackie: Still troubleshooting for campus issues. Have not heard from EL on reporting codes. Will contact EL for an update.
12/8 - Jackie: Continue troubleshooting. Big concern is reporting codes. Have not received feedback from EL. Mitch is following this ticket. Have reported all issues to EL.
12/15 - Jackie: Have more cases to submit today. Related to serials. Will continue to review Redmine.
12/22 - Jackie: Monitoring updates from EL and sending in anything new.

154 Print Products

Owner: Jackie Crinion

11/3 - Jackie: Most essential is a paper product produced to send to univ. accounting office to pay bills. Have brought this up with John Larsen at EL. Will explore when functional testing is available.
11/17 - Jackie: Working with Madison for the next 2 weeks.
11/24 - Jackie: Will start testing this week.
12/1 - Jackie: Needs more work. Will be contacting other campuses to see if they have managed to create print products - who is doing what. Have not seen anything in a print product yet.
12/8 - Jackie: Accounting information to the university. Having some issues. Leia is working this. Can get a print order and a print claim, but cannot get the voucher with the financial info that the campus needs. Madison and MKE need this day 1. Other campuses may not. next step: need to report this to EL. John gave them some info at the workshop - need to find out more about that. Need more instruction on that. Jackie will contact EL today.
12/15 - Jackie: WebEx today.
12/22 - Jackie: Had a useful meeting. EL gave info for analytics. Need to do testing of invoices and see how they print.
1/12 - Jackie: Need to test invoices. Leia and Jackie will do this this week and next.
1/20 - Jackie: No update.
2/3 - Jackie: Working on this in analytics. Working with MKE. Need to verify we are getting the info we need and can create a workflow out of this.
2/9 - Jackie: Have not begun to experiment with this. This is high priority. Have the query, need to run data through it and test to see if it will serve our needs. Leia and Jackie will test this week.
2/16 - Jackie: Experimenting. Creating orders and test invoices and testing results. Will do this until 2/25.
2/23 - Jackie: Testing. Bill's team will have orders and invoices in place by Wed and then start working with orders and analytics.
3/2 - Jackie: Hope to start doing approvals this week and looking at paper documentation.
3/9 - Jackie: Still testing this week. found a few anomalies. Will finish this week.
3/16 - Jackie: Invoice testing continues. Looking at workflow. Will work on running the report.
3/30 - Jackie: Progress has been made. Creating a redmine ticket about unique identifiers for vendors. Leia is still working on the information for the form. A few more data elements are needed and some work on page breaks is needed.
4/6 - Jackie: Responses from EL. Made suggestions. Working on those this week. Should take care of the remaining issues.
4/13 - Jackie: Looking good. Needs a little cosmetic cleanup. It does work. Will share the analytics with MKE. Complete.

155 Define Acq. Workflow

Owner: Jackie Crinion

May form a team to discuss process definition and communication.

9/8 - Jackie: No progress. Will make this an agenda item at the next team meeting.
9/15 - Jackie: Continuing discussion. Have asked for a meeting with Adriana, no response yet. Will ping her if no response by cob today.
9/22 - Jackie: Meeting with EL this week. Will also have a lot more idea after the Oct workshop. Madison is doing some testing now, but not system-wide yet.
9/29 - Jackie: Met with EL. Did not really discuss workflows in that meeting. Will create workflows for Madison. Other campuses can review these and make decisions about individual campus workflows. Team will be available to assist as the campuses work this out. This includes role definitions. System-wide recommendations - some have been developed and communicated - there may be more going forward as we work through our best practices.

(Paula) When will this be done for Madison? When can we say that we have given the campuses all of the system-wide requirements?

Team has established recommendations except for embedded order data. Others may evolve from the Madison discussion.

10/6 - Jackie: UW and MKE are working together on workflow ideas for future documentation. Working on a list of things we need to know how to do.
10/13 - Jackie: Working with Madison data. Looking at user manager roles. Coming up with questions for the workshop.
10/20 - Jackie: Will be testing this in the next test load. Looking at creating "cheat sheets" for training. Will have more movement after the workshop and when there is access to the test load.
11/3 - Jackie: Locally - looking at the processes and will share with other institutions when complete. every campus will do this differently. Will give advice and answer questions.
11/17 - Jackie: Looking at processes and campuses are working internal processes. Discussing how much sharing should be required. Plan to post UW and UWM to wiki.
11/24 - Jackie: Discussion continues. Team members are looking at internal processes. Monographic workflow is pretty much worked out for Madison. Willing to share with others, but it may not be helpful for others.
12/1 - Jackie: Working on monographic and serial workflows. Will post the basic outline on the wiki.
12/8 - Jackie: Monographic is coming along well. Serials discussion on Wednesday. Have a 3 page document of questions to discuss. Adriana is in the loop on the questions.
12/15 - Jackie: All campuses are working on this, but have not posted their workflows yet. Will follow up with posting instructions.
12/22 - Jackie: No new progress. Will pick it up after the holiday.
1/12 - Jackie: Will begin posting some of madison's this week. Team will share Mad procedures, but will not be mandating workflows for other campuses or monitoring their development of workflows.
1/20 - Jackie: Started posting workflows on the wiki for Madison. Encouraging other campuses to do the same.
2/3 - Jackie: Haven't received any from campuses. Team members say they are working on theirs. Will mentioned this again today in the Reps meeting. Get the campuses to post their drafts.
2/9 - Jackie: After last meeting, Mad has posted draft training docs. Other campuses need to follow but haven't started. They don't feel a need to have this in writing. Will discuss this at the FTC meeting this week.
2/16 - Jackie: Will bring up with campus contacts tomorrow.
2/23 - Jackie: Testing. No instructions in place yet. Will continue to post docs from Madison, otherwise, the campuses are driving their own. Team will be available to assist them going forward. Complete.

156 EResources Acquisitions in Alma

Owner: Jackie?

2/3 - Jen: Never used Voyager at LC for Acquisitions - no data to test in Alma. Issues with fund structure moving over to Alma. Will wait until after the fiscal year. How many campuses are doing their EResources acquisitions in Voyager? Should this wait until after go-live?
2/3 - Jackie: Did they place orders in Voyager? Jackie will contact Jen and get details.
2/9 - Jackie: Talked with Jen. Jen is reviewing ER goals. Working a questions for her about LaCrosse. This may not be an ongoing item. Will talk with Jen again.
2/16 - Jackie: Have an email from Jen and will respond to that. This is a LC issue/question, not an action item.

158 Populate Alma KB

Owner: Jackie

2/16 - Jackie: Have not worked on the KB at all. 2 policies on the wiki that can go over.
2/23 - Jackie: Will post 2 policy statements from the wiki today.
3/2 - Jackie: Did not post last week, but will post this week.
3/9 - Jackie: No update.
3/30 - Jackie: Leia is concerned about naming conventions for Madison docs. They will discuss.

159 Post Testing Assessment - Resource Sharing & Eshelf

Owner: Tech Data, Fulfillment, Discovery

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2/20 - Mitch & Bruce: When functionality testing is complete and all tasks identified as critical are identified and tested. Under the protocols, each team performs functional testing. Work with all FTCs to determine if there are any outstanding functional issues. Discuss the state of resource sharing and eshelf with Discovery and Fulfillment. Deliverable: Risk analysis for Steering Committee including: what is resolved, what is not resolved, established workflows and workarounds. Establish go/no-go and/or strategy for isolated issues that are not ready but are not mission-critical to go-live. Dineen and Katie work with other FTCs to solicit input and then meet with Bruce. Bruce submits report to Mitch who takes it to Steering.
3/16 - Jackie: Discussed in the Strategy meeting last week. Waiting for instructions from the testing team.
3/30 - Jackie: No requests from the testing teams.

160 April: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.
4/6 - Jackie: I sent her Dineen's report spreadsheet - she will use it as a template to report to Mitch this morning.

161 Workflow Review & Options

Owner: Jackie

4/13 - Jackie: Explore workflow topics in team meetings - review to make certain there is agreement - answer campus questions and discuss issues.
5/4 - Jackie: Worked on serials procedures last week/. Draft will be posted today. Also working Madison procedures.
5/18 - Jackie: posted. Complete.

163 Rollover Processes - Fiscal Year

Owner: Jackie

2/9 - Review Rollover processes and procedures. Each campus will do this their own way. Will rollover end of June.
5/4 - Jackie: Have the documentation and reviewing this week.
5/18 - Jackie: No progress. MN says this is easy. Will coordinate with the other schools.

164 May: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

167 Project Close Activities

Owner: Each Team

Goal: Work with Tech Data to conduct final system status review and identify and resolve existing mission-critical issues at all campuses.

168 EDI & EOD

Owner: Jackie

2/9 - For campuses not currently using this functionality. Go to YPB and have it set up. Will we provide assistance to those schools who are not using it?

169 Digital Team

Team Members:

Ann Hanlon, Chair (Head, Digital Collectons, Milwaukee)
Peter Gorman (Head, UW Digital Collectins Center, Madison)
David Mindel (Digital Collections, University Reporitory Librarian, La Crosse)
Melissa Olson (Digital Initiatives Librarian, Parkside)

170 Metadata Workflow

Owner: Peter Gorman

6/17 - Peter (with Mitch): Explore potential for Alma to facilitate workflow for metadata to determine if it can provide efficiencies.

6/19 - Ann: There may be overlap. Efficiencies for metadata should be investigated. Can we gain any advantages from having access to global authorities. Currently investigating by experimenting in the sandbox. If workflows are not clear from the sandbox, will continue exploration after implementation. Also dependent upon developments from EL. They have alpha projects looking at non-MARC metadata for digital objects.

171 MOUs

Owner: Peter Gorman

6/17 - Peter (with Mitch): Would it be useful in tracking MOUs within the ER management function of Alma?

6/19 - Ann: The EResources team may also be looking into the MOUs. She will check.

172 Citation Database & Other Non-MARC Resources

Owner: Peter Gorman

6/17 - Peter (with Mitch): Is there potential in non-MARC cataloging - for example: citation databases?

173 Maintain Awareness of Future Digital Potential

Owner: Ann Hanlon

6/18 - Ann: Keep abreast of and communicate advances in Alma technology for digital collections. Are other universities using Alma for this purpose? Keep in contact with EL about what they have in development.

7/1 - Ann: Sent an email to the Alma list to ask EL personnel to reply with information about future application development. Reply from Adriana: Hi Ann: We will forward your questions to Product Management. Thanks, Adriana

7/21 - Ann: Email to lsp-digital - We have an Alma Digital Functional subcommittee meeting this week on Thursday. I spoke with Ex Libris representative Sarina last week about planned developments for Alma that might benefit digital collections and/or non-MARC metadata. I will share with you that I found it to be a disappointing call. The discussion didn't yield any insights into Ex Libris's development plans in this regard. She did, however, express that they would be interested in hearing how our digital repositories might not be meeting our needs. To me, this seems more like a sales call than a discussion of Alma's workflow capabilities for non-MARC. I'd be interested in how you all see this, if you think it's worthwhile to contribute this information or not. I look forward to talking on Thursday. Feel free to share via this listserv as well.

7/24 - Ann (email): I met with the Digital functional subcommittee this morning to discuss Ex Libris' request for "shortcomings of our current digital repositories." I am waiting for their consent on a recommendation in response to that. Peter wasn't able to make this morning's meeting so I don't want to share the recommendation until everyone has had a chance to weigh in on it. So - more as soon as I have word.

174 EResources Team

Team Members:

Craig Thomas, Chair (Systems librarian, Oshkosh)
Karen Jander (Team Leader, E-Resources/Serials, Milwaukee)
Jen Holman (E-Resources/Periodicals Librarian, Lacrosse)
Melissa Platkowski (Coordinator of Library Technology, Green Bay)
Taryn Resnick (Acquisitions Librarian, Madison)
Jessica Donahoe (Automation, Platteville)

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- 176 Migration Form**
Owner: Craig Thomas
7/1 - Craig: Know what they are responsible for and will address those in draft recommendations. Expect to have to monitor the conversation until the forms are due.
7/7 - Craig: Recommendations are in.
7/22 - Craig: On schedule. Monitored and responded to comments.
7/29 - Craig: On schedule, no issues. Checked with EL to verify how to enter the online elect location.
8/5 - Craig: On schedule. Still following up with the online elect location. EL has given choices, but no recommendations. He is pressing Svetlana for additional information.
8/12 - Craig: Heard back from Dolph. Posted the recommendations and posted to wiki FAQ and updated ER recommendations. Complete except for questions.
- 177 Migration Form Recommendations**
Owner: Craig Thomas
7/1 - Craig: Behind. Won't have actionable information from EL until tomorrow and they need time to get that together. Had hoped to query campus contacts on local practices, but won't have time for that. Will just send recommendations to Steering Committee and have comment after. Thursday's recommendations should be considered draft recommendations (because of the Mig. meeting delay) and we hope to have another opportunity to review and update these recommendations before the recommendations are finalized.
7/7 - Craig: Draft Complete.
- 178 ER Meeting w/EL**
Owner: Craig Thomas
7/1 - Craig: Compiling a list of questions ready for Mitch and EL by the end of business today for tomorrow's EL meeting.
7/7 - Craig: Complete. In follow-up mode on questions that we did not have time to pose and details on questions we did pose.
- 179 ER General Practices Survey**
Owner: Craig Thomas
7/1 - Craig: We have a draft of this but are waiting for information from tomorrow's EL meeting before final draft can be compiled.
7/7 - Craig: Will meet on Wednesday to discuss releasing survey. Need to know process for releasing recommendations prior to sending.
7/29 - Craig: Decided this is not necessary.
- 180 Recommendations for ER Metadata Clean-up**
Owner: Craig Thomas
7/1 - Craig: Cleanup post test load and pre cutover load. We'll compile a list as we go.
7/7 - Craig: Some is directly related to migration and we will act on that first. Plan to migrate in such a way as to minimize post-migration clean-up.
7/22 - Craig: Continue to gather as we produce the recommendations for the forms and P2E. Can see it on AQuery (Karen has access). Craig is learning it in the context of P2E.
7/28 - Craig: On track. Putting them together and posting to the wiki.
8/5 - Craig: Moving ahead. Meet tomorrow to decide how to get this posted and disseminated.
8/12 - Craig: Scheduled a joint meeting for next week to discuss 856 cleanup. 8/20. ER, RM, Discovery, Acqu.
8/19 - Craig: Meeting is tomorrow.
8/26 - Craig: No conclusions from the meeting. Can't know what to do until we see the data. Will meet again this week now that the data are available.
9/2 - Craig: Looking at the data. Meeting tomorrow. Will schedule another joint meeting with RM and Disc. and maybe Acq. in the next week. Will have feedback by the 9/10 deadline. Intend to offer a list of mandatory pre-migration cleanups and also suggested cleanups, along with how-tos for all.
9/9 - Craig: On track. Discussed the list last week and added a couple of things. Will post by the deadline.
9/16 - Craig: On track. Need to pull them together formally.
9/23 - Craig: Discussed at last week's meeting. All post-migration clean-up. Will contact Susan to see if they need to meet.
9/30 - Craig: Nearly all will be post-migration. Will discuss tomorrow at the joint meeting with RM and Disc.
10/7 - Craig: Approved all the cleanup last week. Will write them up and post under RM.
10/14 - Craig: Some have been posted under RM. Writing an account of the 856 cleanup to post.
10/21 - Craig: Haven't finished writing these up.
11/18 - Jen: Completed and posted to the wiki. Jen will review to see if edits are necessary.
- 181 Review & Report on 3 Campus Test Load**
Owner: Craig Thomas
8/5 - Craig: To cover general issues, specifically P2E, ERMS, and SFX.
8/26 - Craig: Pending. Will discuss at this week's team meeting. Will make task assignments to the members.
9/2 - Looking at the data. Meeting tomorrow. Will schedule another joint meeting with RM and Disc. and maybe Acq. in the next week. Will have feedback by the 9/10 deadline. Karen has found and reported issues in Redmine.
9/9 - Craig: Still have to push 2 reports to the AlmaWI list. Waited for additional info from Karen (examples). Has it now and has created issue 510.
9/16 - Craig: issues are all in to the list, complete.
- 182 Develop ER Test Protocols for Campuses**
Owner: Craig Thomas
9/23 - Craig: Will begin working on this immediately.
9/30 - Craig: Being drafted now by Karen and Craig. Will discuss in the joint meeting tomorrow.
10/7 - Craig: Karen has posted gross measures. Went out in Maureen's test email to campuses. Putting together more test cases this week.
10/14 - Craig: All drafted and planning more discussion. Asked for comment, but no responses. Meeting tomorrow.
10/21 - Craig: No comments were received from the team members. Will raise it again at tomorrow's meeting.
11/18 - Jen: Has a draft recommendation and has posted a place for people to start with functional testing. Making good progress.
11/25 - Jen: Posted and being used. Tweeking where necessary. Working well. Added instructions for Google Scholar export setup. Will post instructions for EBSCO host today. Complete.
- 183 Review & Report on Full Test Load**
Owner: Craig Thomas
7/1 - Craig: Once test load is done, we will review and test, note and report any anomalies and determine fixes before the cutover load. Mitch mentioned that he was talking with EL about using the first test extract to test the P2E process. It's possible we could do a test run and review before the full test load happens. Will follow up with Mitch.
11/18 - Jen: Load is being tested. Will discuss in this week's meeting. 2 issues: proxy issue - hardcoded - need to delete out that prefix and use Alma's functionality; Ebooks - getting duplicate links - work with RM.
11/25 - Jen: Review Katie's new spreadsheet and perhaps create one for campus feedback.
12/3 - Jen: Looked at the spreadsheets and talked with the team today. Decided it would be too much work for the campuses to fill one out for ER. Very few reported problems. Have 2 SF tickets open.
12/9 - Jen: No new issues. Working the A-Z list with EL.
12/16 - Jen: Still getting testing issues from campuses.
1/13 - Jen: Complete.
- 184 URL Resolver Issue**
Owner: Discovery and ER Teams
10/15 - Item created at Mitch's request. Matching item already exists under Discovery "Open URL Screens".
10/21 - Coordinating with Katie. Will meet with her next week.

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11/18 - Jen: Not familiar with this issue. Will touch base with Katie.
11/25 - Jen: Issue of print holdings not showing up in the A-Z list. Has been reported to EL. Known issue in Alma, not just us. There is a SF ticket. Will follow up with EL.
12/3 - Jen: Team has decided to move directly to link resolver except Mad. Completed.

185 Configuration

Owner: All Team Members

186 Configuration Form

Owner: Craig Thomas

6/13 - Craig: Inventory network groups.
6/24 - Craig: Creating sub-groups of users on a particular campus in case there are resources that are not routinely available to all users. Will be working with Melissa.
7/1 - Craig: On schedule. Need to survey campuses to see if anyone needs to use these and who they are. Will send a survey as soon as the EL meeting tomorrow gives the necessary info. If so, will survey starting Monday.
7/7 - Craig: Draft recommendations were submitted to Mitch. Waiting to hear back on process from Mitch re: circulating these. Survey will not be going out today. Will meet on Wednesday to discuss survey.
7/22 - Craig: The EResources tab - EL does not see any need for the inventory network groups - so the team has nothing to complete on this form. Met with Mitch yesterday.

187 Configuration Form Recommendations

Owner: Craig Thomas

7/1 - Craig: Will send recommendations to Mitch for Steering Committee. No time for survey because still waiting for info from EL to send out general survey to campuses. Meeting tomorrow.
7/7 - Craig: Draft to Mitch for SC review. May need to revise.

188 P2E Migration

Owner: Craig Thomas

6/13 - Craig: List of Voyager bib IDs for records that are or contain eResources and list of all Voyager locations (by campus) that contain eResources. Both lists must be provided by each campus.

189 P2E Migration

Owner: Craig Thomas

6/24 - Craig: Map basic process - Nearly complete. Posted a process narrative of basic P2E process last night. Diagram will follow end of this week.
7/1 - Craig: Scraped the diagram for now. Expect to have to monitor conversation on this all the way up to the day the form is due.
7/7 - Craig: On target. As a follow up to last Wednesday's meeting, posting to the list to get questions answered by EL.
7/22 - Craig: Everything they need to supply besides cleanup is captured in the migration form. Need to publish mandatory pre-migration data clean-up. Need to deal with 856. Karen R and Karen J are working this.
7/29 - Craig: Have a test set of records in the 3 campus migration. Test the P2E process in general and to track PO behavior. EL could not answer, so we will test.
8/5 - Craig: No change. Will review test load when it becomes available.
8/12 - Craig: No change.
8/19 - Craig: Test data is being loaded today and tomorrow.
8/26 - Craig: Extending out to answer questions. Otherwise complete.
9/2 - Craig: Tested an Aquery database search - posting to the wiki today and will notify camps contacts.
9/9 - Craig: Posted the database searches to the wiki. Posted prelim advice on wiki and will follow up with email to campus reps. Heard back from EL and are distributing the answers.
9/16 - Craig: Complete.

190 P2E File Recommendations

Owner: Craig Thomas

6/13 - Craig: Pre-migration cleanup, eg. - where vendor information lives in the MARC record. Per campus - each instance can indicate, but there can only be one location/campus. Metadata clean-up will be necessary if the information currently resides in more than one field.
6/18 - Mitch: Does the Resource Management team need to be involved?
6/24 - Craig: Yes, RM does need to be involved. A call is scheduled with Susan for today. Dependency between this and the survey.
7/1 - Craig: Talked with Susan and she didn't see any overlap with RM.
7/7 - Craig: Behind because it was not clear from the documentation that this file was on the same timetable as the migration form. Are they going to do P2E as part of the 7/16 submittal for this test load? Discussed with Svetlana - their recommendation is put bib ids in the P2E file for everything that has any electronic inventory hanging off of it. There is no selection criterean other than that.
7/9 - Mitch: Yes, for the three campuses they will do this for the 7/16. Craig should talk with Karen about the best way to inform the submission of the P2E files.
7/22 - Craig: Have to do with how to generate a bib id list from AQuery. Karen R and Karen J are working this with Maureen. Finished the recommendations for the test campuses. Now working for the other campuses. Nothing to do with the configuration form, so dates are moving in accordance with the new schedule. Need to generate instructions as to how to generate this file.
7/29 - Craig: On the way today. He and Karens will get these together in the next day.
8/5 - Craig: A little behind. Will discuss tomorrow. Expect to finish by the end of this week.
8/12 - Craig: Contacted Karen J and Karen R. Need to know what their script is so it can be tested. Then will publish to the wiki.
8/13 - Mitch: there is a dependency. Campuses need this for the migration form.
8/13: Paula: Emailed Craig. He is aware of the dependency and will follow up as soon as Karen R returns from vacation.
8/19 - Craig: Got data from both Karens. Has what he needs to get a procedure put together and is working it now. Plan to discuss at the meeting this afternoon and post to the wiki and email implementers.
8/26 - Craig: Complete. Posted the process to the wiki. Notified community via blog and listserv. Testing an AQuery search that will identify databases.
9/16 - Craig: recommendations went out. Complete

191 ERMS Migration

Owner: All Team Members

192 Study ERMS Migration

Owner: Craig Thomas

7/1 - Craig: In process and going well. Need to know when ERMS migration happens. Not clear from the migration form. Will raise this issue in the meeting tomorrow.
7/7 - Craig: Making progress. Exploring an automated process to put Voyager bib ids or SFX ids into Coral. Likely will not be finished before the test campus extract.
7/9 - Mitch: This is an opportunity to test Coral (ERM data). Needs to know what needs to be done on the MKE migration for to allow for a test migration of ERM data. This may be out of scope for this test migration. Mitch will review the email conversation and follow up with Craig and Karen.
7/9 - Email response from Craig:

1. MIL needs to make sure each CORAL record has a reliable unique identifier Alma migration can use to find an Alma destination for CORAL metadata. Karen J thinks the PO number would work and is investigating. Otherwise, migration prep is likely to require injection of Voyager bibids or SFX ids into CORAL records using something like ISSN or ISBN as a match. Melissa has developed and documented a manual process for this that would work for all campuses. At Oshkosh, we're working to develop a semi-automated method to do the same, but it won't be ready next week.

2. The main roadblock, however, is mapping CORAL source fields to target fields in Alma. This is something Oshkosh has taken on. Ex Libris provides no documentation or support for mapping to non-ExL ERMSs. The list of Alma fields is long, but manageable. The real work will be on the CORAL side, where the data model is huge, complicated, and diffuse because CORAL uses separate, free-standing modules for different functional areas (e.g. resources, organizations, usage). I'll post the CORAL listserv this afternoon to see if any CORAL shops have already done the mapping for an Alma migration. If that shortcut works, we might have a chance to make this happen by next Wednesday. I'll keep you posted.

7/22 - Craig: This is very complicated. He is trying to tap the tech people at Oshkosh and La Crosse because Madison does not do this. MKE does use this, but it will not be included in the test campus migration. Jim L. concurs. Craig has pinged the AlmaWI list to get an explanation if ERMS migration can happen after general migration. No reply yet. May be a complete separate process that can't happen until migration is done. Hoping to use the Aug test load to test this afterward.

7/23 - Mitch: Need confirmation from ExL as to where this fits. If Craig does not receive an answer by Monday, Mitch will bring it up at the ExL meeting.

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7/29 - Craig: EL claims that it has to happen along with the general migration. Craig doubts this. Mitch, Bruce, Jay and Craig have been corresponding on this. The contract calls for us to do all of the field mapping. Question becomes, is the migration of this data worth the migration effort. Some of this data is going to dup data that will already be in Alma from SFX. We need to check the results of the campus test load to see how much data is already there. Waiting for the test load, but also, in Osh, working to implement data loading scripts for Coral.

8/5 - Craig: Waiting for the test load for feasibility. Coral loading scripts: have completed proof of concept at Osh. Holding off to develop it until the test data.

8/12 - Craig: Waiting for test load.

8/13 - Mitch: will follow up with Craig re: Coral. MKI Coral data is not included in the test migration.

8/19 - Craig: Saw Mitch's email to Svetlana but has not seen her response. Can't review this until the test load data.

8/26 - Craig: Waiting for the test data.

9/2 - Craig: Have credentials and will assign to team members tomorrow.

9/9 - Craig: Pending. Highest priority was to look at UB and basic migration by the 10th. Will look at this after.

9/23 - Craig: Dependent on SFX migration testing that is still underway.

9/30 - Craig: Mitch and SC decided this will not happen. Closing.

193 SFX Migration Testing

Owner: Craig Thomas

6/13 - Craig: How does SFX data migrate? What about that is the responsibility of the ER team?

6/24 - Craig: Mitch is arranging a meeting between ER team and EL migration team. Will also be discussing this with Susan.

7/1 - Craig: Susan did not feel there was overlap. Need to ask questions about this in tomorrow's EL meeting. When does this take place? Do all of the Voyager migrations happen first, or is it campus by campus? (SFT + Voyager). Migration form - question on whether to bring SFX records over. Line 13. How do we want to represent ER if this happens campus by campus?

7/7 - Craig: Following up with EL. Did not get to this in the meeting. Sending emails to the list tomorrow.

7/22 - Craig: Not caught up with this item. It's not clear that we have any choices at all in SFX. Need to send emails to confirm this.

7/29 - Craig: On track. Re-reviewed the SFX documentation and we're in good shape. We have sent a question to EL on which SFX targets will be missing in Alma. Also sent a question to Discovery on section 5 of the guide Other SFX Services. Determining which team is responsible for each part.

8/5 - Craig: Heard back from EL on the missing targets. They requested examples of what we need. Will discuss with team tomorrow. Have contacted Katie about other SFX services. Will meet with her this week to discuss division of labor.

8/12 - Craig: Found out where the local target parsers live. Will discuss tomorrow and see how to re-create them in Alma. Will discuss with Katie at the 8/20 meeting.

8/19 - Craig: meeting tomorrow. Got a local parser example and will forward to ExL today. Will discuss the Discovery Team part tomorrow.

8/26 - Craig: Will email ExL today. Met with Katie S. and have divided up the work with Discovery. ExL will be doing most of this. Need the Primo box to complete this.

9/2 - Craig: Primo box scheduled to be delivered today. Sent a local target parser sample to ExL so they can show us how to re-create the same functionality and user experience in Alma link resolver.

9/9 - Craig: Have not heard back from EL in a thread on the target parses. Waiting for Marina. Craig will ping her.

9/16 - Craig: Working this. Will be late with no dependencies except Coral

9/23 - Craig: Need to check ERMs-like fields in alma to see what SFX data came across.

9/30 - Craig: Decided we can't really do a good job of testing this until all of the campuses can see their data and test it. Will discuss tomorrow at the joint meeting - in the context of the test protocols.

10/7 - Craig: Did not discuss last week. Will discuss this tomorrow. Have gotten Maureen involved. Will ask the team to get into this test environment and provide feedback.

10/21 - Craig: Have not met again on this. Email last week: Maureen wrote and asked all of the teams to concentrate on testing. created a wiki page and a due date (11/14) for comments to get back to Maureen.

11/18 - Jen: Mitch will discuss this today.

11/25 - Jen: SFX migrated fine. Complete.

194 SFX Migration Protocols

Owner: Craig Thomas

10/7 - Craig: Meeting tomorrow to initiate discussion.

10/14 - Craig: Meeting with Jen and Melissa today. Email from Bruce relaying concern from 3rd party group. Unclear who was going to address this, we have stepped up to do that.

10/21 - Craig: Discussed internally and decided this is a non-issue. Jen was worried about the links to resources not migrating effectively, and that is not an issue. Closing this item.

196 E-Book Options

Owner: Craig Thomas & Resource Management

6/13 - Craig: How to approach this as a consortium? How much is our responsibility? How much is Resource Management?

6/24 - Craig: Under discussion this week in the Wednesday team meeting.

7/1 - Craig: Understand the options. Do not yet understand local campus practices and/or preferences. Need to survey campuses in the general survey.

7/7 - Craig: No progress. Will take it up in the Wed weekly meeting.

7/22 - Craig: Will meet with Susan F. Susan will set up the meeting time. Discussed briefly. Look at the test data to learn about how this will all display for staff and users.

7/29 - Craig: The meeting with Susan is scheduled for the end of this week. Also making progress in the mean time. Survey is out to the campuses on overlap with the Madison ebook packages. Replies due this week. On track to offer recommendations on time.

8/5 - Craig: Results are coming in. Will discuss in tomorrow's meeting.

8/12 - Craig: Surveys are nearly all in. Will discuss results in tomorrow's meeting.

8/19 - Craig: karen has been out. Will discuss this week.

8/26 - Craig: Karen is updating the survey results. Will discuss tomorrow.

9/2 - Craig: Discussed last week. Will send out a second version of the survey because other packages have been identified in the first survey. Next piece will come when we have the Primo box. Need to filter out apparent choices that are really not choices to improve the user experience.

9/9 - Craig: Pending testing to confirm, this may be moot. EBooks are displaying exactly as we want them to in Primo. (prelim testing)

9/16 - Craig: Karen is following an experiment that Colleges is doing. This will be late.

9/23 - Craig: Have several tests going on with full test load. Will need to see how those turn out.

9/30 - Craig: Need to see all campus data and the results of the Colleges experiments. Pushing it out until the full load is available.

11/18 - Jen: Will touch base with Katie.

11/25 - Jen: Shared issue with RM. There is a lot of duplication. Madison loaded MARC records for the Wiley ebook trial. Recommend deleting them before migration. Trial ends 12/31. Work with RM to decide who will put MARC records in the network zone. Need a process for the hundreds of examples. Will have a recommendation by EOD next Wed.

12/3 - Jen: Emailed for feedback. Decided to let campuses migrate ebooks as they've been managing them.

197 E-Book Recommendations

Owner: Craig Thomas

7/1 - Craig: Will survey and have conversation on whether it's possible to make general recommendations or if every campus will go its own way. Will meet with Mitch to discuss this issue.

8/5 - Craig: Have not met with Mitch, will schedule. Will involve coordination with Madison through Karen R. On track to offer recommendations on time.

8/12 - Craig: Dependent on the prior action item.

8/19 - Craig: Will discuss with Karen this week.

8/26 - Craig: Karen is updating the survey results. Will discuss tomorrow.

9/2 - Craig: dependent upon the previous action item.

9/16 - Craig: Karen is following an experiment that Colleges is doing. This will be late.

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9/23 - Craig: Have several tests going on with full test load. Will need to see how those turn out.

9/30 - Craig: Need to see all campus data and the results of the Colleges experiments. Pushing it out until the full load is available.

11/18 - Jen: Will discuss with Katie.

11/25 - Jen: Shared issue with RM. There is a lot of duplication. Madison loaded MARC records for the Wiley ebook trial. Recommend deleting them before migration. Trial ends 12/31. Work with RM to decide who will put MARC records in the network zone. Need a process for the hundreds of examples. Will have a recommendation by EOD next Wed.

12/3 - Jen: Decided campuses will continue past practices.

198 Develop Model Workflows

Owner: Jen Holman

11/25 - Jen: Will eventually be communicated out to campuses to use if they choose. Template is set up and posted.

12/3 - Jen: Team has decided not to define workflows. Will develop a Tips and Tricks page. After discussion in this meeting - Paula suggested not giving up on this, Jen agreed and suggested working this post go-live. The Team is tied up with testing right now. Will continue to talk about this and work on specific shared points in workflow that each campus will need to know to update workflows for Alma.

12/9 - Jen: Still adding to the wiki as workflows get worked out. Meeting with RM to determine best practices for handling 856 links in Alma.

12/16 - Jen: Progress. Met about 856. Bruce found test cases. Meeting tomorrow to discuss those. Expect to have items for the network group to decide and best practices to share with campuses.

2/10 - Jen: Time to restart this. Will discuss in this week's meeting.

2/17 - Jen: Met to discuss. Will post to the team wiki page and will post to the KB later when other team's workflows are posted.

2/24 - Jen: Slow progress. Discuss weekly. Not seeing that campuses are posting. Jen is posting. Will discuss this in tomorrow's meeting. Will assign tasks to get this on track.

3/3 - Jen: Karen Resnick at Mad was going to post Madison workflows, but she needs to talk to Jen to discuss an issue. Jen hasn't been able to reach her. Have set responsibility and deadlines for different workflows.

3/17 - Jen: Not working this issue right now due to other more timely items. Waiting for other workflows from other teams. Will check to see if they have been completed.

3/24 - Jen: Going well. Will go on until the end of the project. Items are still on the wiki. Will not move to the KB until go-live. Are ready for go-live in terms of workflows. Ongoing workflows will be discussed after the project is complete and beyond. This item is complete.

199 General Electronic Services

Owner: Jen

12/9 - Jen: Configuring link to Iliad and configuring a feedback form.

12/16 - Jen: Mitchell Scott at GB is helping with testing. It looks like it will work. Getting questions from campuses re: display logic rules and working on those.

1/13 - Jen: Working with Fulfillment. Sent display logic statement to EL and they will set up for campuses in terms of Iliad. Next: Replacing the functionality of an SFX feedback form. Have passed other institution's solutions to Jay and Mitch. Will this be system-wide? Need to keep this open until EL gets the Iliad links going.

1/27 - Jen: EL has done the setup for the campuses. Asked for feedback and no issues reported. No reply from Mitch or Jay re: the feedback form.

2/3 - Jen: Working on the feedback form. Mitch is aware. There is a link that will send an email to Jen, working to fix this. EL thinks this is already fixed. Will contact Jay to see what the solution is.

2/10 - Jen: EL has done setup for campuses. They have been asked to follow up. Should be set for the service.

2/17 - Jen: Waiting to hear back from 4 campuses re: Iliad linking. EL case that our rules are not working. Working the ticket with them. EL closed the case - it will have to be reopened.

2/24 - Jen: Talked with Katie and put up a wiki page to share GES examples. Will share this with the campus contacts.

3/3 - Jen: Functionality is in place. Campus discretion to set up additional GES. Would benefit from sharing the setup for this. Campuses want to wait now until after go-live. Concern that they may break display logic or other things if they did this now. (her team and Katie told her this). Will use the wiki for ongoing discussion. Revisit after go-live and decide on venue for continued discussion.

4/7 - Jen: Getting questions and has created eservices for anyone who has asked and posted them on the wiki.

5/26 - Jen: No requests for any more of these. All requests have been created. Will follow up with Sue D. per a group working on a better solution for a feedback form.

200 Reviewing Open Cases

Owner: Jen

2/3 - Working with other teams to review and resolve open tickets. One issue: Citation linker - is there a need for campuses to use this? Will poll the campuses.

2/10 - Jen: 2 open cases: Iliad and another. The Iliad case is nearly done. The other is from Stout - records that have the wrong resource type. Went to Discovery, but RM needs to look at it too.

2/17 - Jen: Some cases are in development. only one Redmine case.

2/24 - Jen: Have spreadsheet from Mitch and a Word doc of her own. Will turn it into a spreadsheet and send it to Mitch. Nearly everything is closed.

3/3 - Jen: All are resolved or in development except one that is open.

3/17 - Jen: 2 open cases - both are in development.

3/24 - Jen: Have opened a case or two. Under control. Not related to RS.

3/31 - Jen: A couple are in dev. Will review the new spreadsheet for final recommendations.

4/7 - Jen: Reviewed on Friday. Opened one new case. Reported existing cases to Mitch.

4/14 - Jen: EL hasn't responded lately. Nothing that can't wait until after we migrate.

4/28 - Jen: Working non-critical issues.

5/12 - Jen: Still working a couple of small cases - nothing major.

5/26 - Jen: Current with Redmine - reviewing email.

201 Alma Link Resover Customer Menu Services Page

Owner: Jen

2/3 - Jen thinks this should be done. (Team wants to postpone until "later." Customizing the style sheets - look and feel. Will need to pull in other resources - Katie (discovery). Also, want to get the feedback form working in case something isn't working. Katie has put together instructions on how to customize this, but Jen feels it isn't enough. Need to communicate what is lacking in the instructions - need more - and different campuses have their CSS hosted in different places. Need to investigate this further.

2/10 - Jen: Working with Discovery. Have access now.

2/17 - Jen: No progress. Sent out suggestions to the team for their comment. Will compile at next week's meeting.

2/24 - Jen: Figured out what can be done within the fulfillment labels to add images and html to those fields. Created an instructional doc and shared on the wiki.

3/3 - Jen: complete.

202 Citation Linker

Owner: Sue D and Jen

2/3 - Works fine for Jen, but doesn't work for Madison. Issue in Sales Force. Will work with Sue to resolve. Should both have the same data.

2/10 - Jen: It isn't working for Jen either. Will watch this. Right now, UW does not intend to use this tool. Katie is working on instructions for how to remove the links to CL and the journal a-z list from Primo.

2/17 - Jen: In development. Removing the links. Closing.

204 Populate Alma KB

Owner: Jen

2/10 - Jen: Posted the first doc.

2/24 - Jen: Will post additional docs soon. Has reviewed it. Easy to search and create docs.

3/3 - Jen: Will request access for other team members.

3/31 - Jen: delegated to Karen Jander.

4/28 - Jen: Karen J. planned to postpone until June - but I recommended doing it now. Jen will talk with Karen.

5/12 - Jen: Will meet with Karen tomorrow.

5/26 - Jen: Met with Karen. Document has been moved. Will double check with Karen.

205 Post Testing Assessment - Resource Sharing & Eshelf

Owner: Tech Data, Fulfillment, Discovery

2/20 - Mitch & Bruce: When functionality testing is complete and all tasks identified as critical are identified and tested. Under the protocols, each team performs functional testing. Work with all FTCs to determine if there are any outstanding functional issues. Discuss the state of resource sharing and eshelf with Discovery and Fulfillment. Deliverable: Risk analysis for Steering Committee including: what is resolved, what is not resolved, established workflows and workarounds. Establish go/no-go and/or strategy for isolated issues that are not ready but are not mission-critical to go-live. Dineen and Katie work with other FTCs to solicit input and then meet with Bruce. Bruce submits report to Mitch who takes it to Steering.

3/17 - Jen: Doing a lot of testing with open URLs from third parties. Set up a wiki page to set up an Alma augmentation profile to identify Crossrefs DOI linking. In order for the linking to work, must have an account set up with Crossrefs. Campuses need to do this. Will email Dineen. Working with Discovery. If there is not enough metadata in the URL, it will not default to Iliad.

3/24 - Jen: No contact from Tech/Data or others so far.

3/31 - Jen: eshelf test migration started.

206 April: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

208 May: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

5/12 - Jen: Reviewed. No new issues.

211 Project Close Activities

Owner: Each Team

Goal: Work with Tech Data to conduct final system status review and identify and resolve existing mission-critical issues at all campuses.

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212 Fulfillment - ILL Team

Team Members:

Dineen Grow, Chair (Head, Access Services, Madison)
Leigh Dorsey (Head, Interlibrary Loan, Milwaukee)
Aaron Dobbs (Access Services, Milwaukee)
Mitchell Scott (Resource Sharing Librarian, Green Bay)
Patty Fragola (Head, Library Systems and Automation, Whitewater)
Kati Tvaruzka (Head, Access Services, Eau Claire)
Heather Weltin (Interlibrary Loan, Madison)

213 Configuration Forms

Owner: All Team Members

6/23 - Dineen: Put in the users, policies for use, calendars, helping Michael map the locations to fulfillment units, item types. 70% of the form is complete. Has been posted to the wiki. July 11 meeting planned with the campus circ world to review form line by line so they all understand how we will map things and give us any anomalies that need to be accounted for.

6/30 - Dineen: Waiting to get the locations in. Michael will have them to her by the 7th.

7/7 - Dineen: Michael has all but music. Expected tomorrow or the next day, have entered fulfillment units for those locations. Getting PP together for 7/11 configuration meeting.

7/14 - Dineen: Complete (90%) except for reported issues (to Curran). Still need to ask EL about Resource sharing.

7/21 - Dineen: No update.

8/4 - Dineen: Form is posted. Complete. Will mention the general tab at the meeting tomorrow to try to reach a general understanding.

7/28 - Dineen: Filled in the music locations. Have not heard back from EL on the resource sharing or on the calendar and how that should be entered, or the questions sent to Adriana through Mitch. Paula will follow up with Mitch. Questions were sent last Thurs or Friday. Needs answers to continue. Paula emailed Mitch. His email reply: I suspect that Dineen is referring to this exchange with Curran, Karen and myself, from last Wednesday. In it she asks us to let her know when to post to the alma-wisconsin list. I never followed up. I've asked Curran to go ahead and let Dineen know to post to the list.

214 Migration

Owner: All Team Members

6/23 - Dineen: Listing of the internal patrons is the only responsibility of this team. She has completed a form, but has not put it on the migration form because there isn't enough room. Need to talk about work orders to determine if some of the internal patrons can go away (on Curran's agenda). Complete except for Curran's meeting.

6/30 - Dineen: Waiting for Curran's meeting (lsp) tomorrow.

7/7 - Dineen: Didn't come away with any decisions. People will be looking at the work orders. Will bring over internal patrons and worry about internal patrons post-migration.

215 Determine Fulfillment Units

Owner: Dineen Grow

6/4 - Dineen: Determine the 5 unit types to which all of our locations will be mapped. Information has been distributed to the team and they are reviewing now. Dependencies- consortial decision.

6/23 - Dineen: Complete. Consortial decision will be on fines and fees, but will not determine unit types.

216 Determine Patron Types

Owner: Dineen Grow

6/4 - Dineen: Determine the 4 patron types to which all of our patron groups will be mapped. Information has been distributed to the team and they are reviewing now. Dependencies- consortial decision.

6/23 - Dineen: Have been determined, but are waiting for the Steering Committee take the recommendation and give ok based on the outstanding information with fines. Need to meet with EL on Wed to talk about borrowing across the UW system. EL is working from a recording of the conversation from last Friday (fines) and Mitch will follow up with them.

6/30 - Dineen: Complete.

217 Write Recommendation for Campus Contacts

Owner: Dineen Grow

6/4 - Dineen: Memo to recommend the standardized circulation policies across the system.

6/23 - Dineen: Complete.

218 Determine Survey Outliers

Owner: Dineen Grow

6/4 - Dineen: Send to campus contacts results of survey for services unique to campuses.

6/23 - Dineen: Complete. Has been posted on the wiki.

219 Contact Alliance Partners for Booking

Owner: Dineen Grow

6/4 - Dineen: Ask alliance partners how they handle equipment charge outs.

6/23 - Dineen: Complete. Talked to Cascade Orbis and have answers. Will require testing on our part to determine what the system will be able to do.

220 Interlibrary Loan and Alma

Owner: Heather Weltin

6/4 - Dineen: Strategies for filling ILL requests determined. Dependencies- consortial decision.

6/30 - Dineen: Using a solution other than alma. Complete.

221 Write Circulation Policies

Owner: Dineen Grow

6/4 - Dineen: Finalize all circulation policies with regard to recalls, notices, fines fees, and which items will be requestable. Dependencies- consortial decision.

6/30 Dineen: Complete.

222 Testing of Consortial Borrowing

Owner: Dineen Grow

6/4 - Dineen: Determine if items can circulate the way we intend, if patron notifications are being sent properly, if fine function is working as expected, if patron records are loading as expected, if patron types have proper loan periods, if system calendars are set correctly.

6/10 - Email from Mitch to Internal Alma Wisconsin: Text of email identified specifics with regard to the question UB and how differeng campus loan policies for inter-campus borrowing may be accomodated within Alma.

6/13 Email reply from Adriana to Mitch: "Thank you for bringing up these questions. We would like to discuss current differences in model and functionality between Voyager Universal Borrowing and Alma esource Sharing with your team. Because UB can be implemented very differently in different organizations, we would like to propose that we first host a session to discuss your workflows in Voyager Universal Borrowing to understand what aspects of it you are using. This discussion would begin with Wisconsin demonstrating your workflows in Voyager UB. We can then schedule a follow-up session with the ExL project team and our Alma resource sharing experts. This session would be a demonstration of Alma resource sharing as it exists today and answering the questions below.

6/17 - Email from Mitch to Dineen: "I've asked ExLibris to schedule this for 10:00. Would you be able to demonstrate and explain to them our UB process and explain the loan policy issue that we're concerned about? " Meeting is scheduled with EL for 6/20 at 10 am.

8/4 - Dineen: Need the test data to procede.

8/25 - Dineen: Haven't heard back from Curran re: pwd setup. Collecting the netids from her staff. Need two more.

9/8 - Dineen: Routing testing will be done after the functional testing. All IDs have been set up. for data migation testing.

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9/15 - Dineen: Have not been able to test it because things are not set up properly for resource sharing. Need to figure out what's missing and contact ExL. Aaron Dobbs and Dineen are following up.

9/29 - Dineen: Currently testing and working issues with the 3 campus extract. Hoping the Oct workshop will give more info about what we may be doing wrong. Is the system wrong, or is this a training issue?

10/6 - Dineen: This is UB and will discuss with EL tomorrow.

11/3 - Dineen: We need functionality from EL and then test the functionality. This will begin 11/17.

11/17 - Dineen: Starting this week. Testing the scenarios that are listed on the wiki.

11/24 - Dineen: Met with Discovery and walked through the steps with Alma Primo and Alma and came up with some concerns. Katie and Sue D. are opening SF tickets for them. Most of the requests are failing through Alma Primo - not sure why.

12/1 - Dineen: Have a meeting with EL on 12/3 to discuss those.

12/15 - Dineen: Continuing testing and opening tickets. the issue from the 24th has gone away.

1/12 - Dineen: Failed testing resulting in postponing go-live.

1/21 - Dineen: Mitch requested criteria for testing and acceptance. Met with Katie. Discussing. Sent Katie records to test and sending some to MKE tomorrow to see if some issues are fixed. Some fixes are scheduled for March.

2/2 - Dineen: Continues. Updated the spreadsheet with next steps. Still some fundamental things that are not in place. Will need to retest in March.

2/16 - Dineen: Testing continues. Some resolutions are still in development.

2/23 - Dineen: Memo this morning to campuses asking for 15-20 new requests to target certain target issues. Respond by Friday.

3/2 - Dineen: Sent out results to katie this morning. Waiting for her feedback.

3/9 - Dineen: Haven't met with Katie yet. Will follow up.

3/16 - Dineen: Very close. 3 or 4 things left on the spreadsheet. 2 issues need more work than the others. May have work arounds - not pretty - will discuss with Mitch and Katie.

3/30 - Dineen: Local campus libraries set up with UW system libraries. Testing this week and next.

4/6 - Dineen: Nothing new to report. No new issues identified. Working with staff and procedures.

4/13 - Dineen: Everything is working - just need people to do it before we turn it off. No new issues.

4/27 - Dineen: Complete.

223 Determine Policies for Transiting Items

Owner: Dineen Grow

6/4 - Dineen: Determine how we intend to move books among campuses. Dependencies- consortial decision.

6/30 - Dineen: Will discuss further after the meeting on Thursday.

7/7 - Dineen: No update. Not sure what next steps are. Probably take another look at EL PP to get an understanding of what we heard on the call and make a list of questions for EL.

7/14 - Dineen: No new news. Dineen needs to review the PP and see what is outstanding.

7/21 - Dineen: Looked at the PP and it didn't help. Working with EL to find out how to set up the config. form to accomodate universal borrowing. Not getting responses. Need Curran or maybe Mitch to help out. She will bring it up at the LSP this week.

7/28 - Dineen: Patron tech subgroup is supposed to send her questions to share with the Team - by today but she hasn't seen them yet. (Scott Prater). Set up a conf call with the Fulfillment Team for next week to discuss the config form, the last section general requirements, as well as the patron questions from Scott.

8/4 - Dineen: This will not be set up until after testing.

8/25 - Dineen: Got questions from the Tech group and will discuss on Wednesday.

9/15 - Dineen: Nothing new.

9/29 - Dineen: Still testing UB so these are still being worked out. Putting in requests to see where the go. Right now, Mad cannot make those requests of other campuses. MKE and RF had intermittent success. Working the issues.

10/6 - Dineen: Have a meeting with EL tomorrow to continue talking about UB. Continuing to work issues. Katie has forwarded questions in advance of the meeting.

10/20 - Dineen: The functionality is not there. Had a call with EL and are putting this on the mission critical list for day 1. No ETA on a solution as yet.

11/3 - Dineen: EL will send a new script for our review. Waiting for that to arrive.

11/10 - Script has arrived.

11/17 - Dineen: Using the script to do the testing.

11/24- Dineen: Closing this item as the consortial borrowing item covers it from here.

224 Set Up the User Templates

Owner: Dineen Grow

6/23 - Dineen: Do not know who will be responsible for this yet.

6/30 - Dineen: Need to check with Curran about dates and who is responsible for this action item.

7/1 - Paula: sent an email to Curran requesting clarification. Reply from Curran: I believe this refers to setting up templates to be used when creating staff accounts in Alma. Basically, we will want to identify "types" of staff users and create templates for them to make sure they have the correct privileges.

Things I need to do so this can happen:

1. Document our current Voyager accounts and privileges.
2. Propose an initial mapping of Voyager privileges to Alma privileges.
3. Get feedback on that from LSP-PC and functional teams.
4. Create templates.
5. Create staff accounts using those templates.

Does that make sense?

As for dates - We won't be doing this for a little while yet - I need time to get our current Voyager accounts documented, and we don't have the authentication piece set up for staff accounts. When we do, that will be the time to proceed with creating the accounts. Steps 1-3 can happen before that though, and are on my list of things to do in the next couple of weeks.

8/4 - Dineen: Is this an LSP discussion? Will need template for each area - access - who has authority for editing, etc... Role templates for larger libraries. Individual access for smaller libraries.

8/11 - Dineen: Will bring this up in the next LSP meeting with Curran & Karen. Will put it on the agenda.

8/13 - Mitch: How do we structure this for purposes of the test? Will touch base with Dineen.

8/25 - Dineen: Discussed in the LSP meeting. Will be discussed for Mad at the Cirdmp team meeting. Expect that the system will be different - so much so that there may not be sense in trying to make a template for them. Will discuss at Fulfillment team meeting this week. May need to be a consortial decision. Small campuses have students doing more and therefore the template may not be helpful.

9/8 - Dineen: have sent them off to Curran. Complete.

225 Run a Report of All Patrons w/More than 1 Active Bar Code

Owner: Dineen Grow

6/23 - Dineen: added today.

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- 5/11 - Dineen: This report has been run. Complete.
- 226 Run a Report of All Patrons w/Protected Address Field**
Owner: Dineen Grow
6/23 - Dineen: Right before cutover.
5/11 - Dineen: This report has been run. Complete.
- 227 Identify Testing Areas - Consortial**
Owner: Dineen Grow
7/14 - Dineen: Meeting Wednesday with CUWL Fulfillment group.
7/21 - Dineen: Set up a strategy for testing. Have a page on the wiki that discusses things we need to test. Adopted the test plans of another of the Alma clients.
7/28 - Dineen: Page is on the wiki. Waiting for the data - test run.
- 228 Fulfillment Input on 3rd Party Integrations**
Owner: Dineen Grow
9/8 - Dineen: get a fulfillment person to work with Bruce's team re: third party integrations. Will be added to a Tech/Data sub team.
9/15 - Dineen: Heather is the rep for remote storage. Complete.
- 229 Re-Create Patron Provisioning Recommendations**
Owner: Dineen Grow
9/8 - Dineen: to send to campus contacts for review.
9/8 - Dineen: Had the discussion. Sending out new recommendations to campus contacts.
9/15 - Dineen: Complete
- 230 Run Proxy Report for All Patrons**
Owner: Dineen Grow
9/8 - Dineen: need to find out who the proxies are for faculty so we can re-enter them on the other side of migration.
- 231 Security Lock Down Recommendations**
10/6 - Dineen: Do we need to worry about locking down computers when walking away? Is this an all campus policy? Will bring up at the All Reps meeting tomorrow. The reason is that EL has us using our personal passwords rather than group logins. No option for group login, need to set policy.
10/20 - Dineen: Mitch has this. Need to check in with him re: status.
11/3 - Dineen: Mitch still has this. Paula will review with Mitch. Katie brought this up originally.
11/4 - Mitch: Training issue. People will need to log out and close their browser. No technical solution to this.
- 232 Special Use Patrons**
Owner: Dineen Grow
10/6 - Dineen: Ask campuses if any of them attach borrowing privileges that are unique to UW System patrons. They can't do it the way they currently do it. Will have to create another patron card.
10/20 - Dineen: No longer an issue. All special patrons will be treated as internal. Special card, but no need for patron load integration.
- 233 Put Sample Customized Notices on Wiki**
Owner: Dineen Grow
10/20 - Dineen: Need to wait for the test load. Hope to configure one of the notices, if successful, will put notices out on the wiki.
11/3 - Dineen: We may be able to use the current language and then imported into Alma. Reviewing now. Will be out on the wiki for strongly suggest use for all campuses.
11/10 - Dineen: Sent a mock-up to Fulfillment and they are reviewing. Plan to finalize on Thursday.
11/17 - Dineen: Ready to go. Will give them to the MKE team to create the XMLS for us. Will post to wiki for others to use.
11/24 - Dineen: Given to the XML person in MKE. More issues than anticipated. Has the language, but will need time to get these up on the wiki.
12/1 - Dineen: Waiting for MKE. They found it isn't as easy as they hoped. Will follow up with Aaron.
12/15 - Dineen: Need to follow up with Aaron.
1/12 - Dineen: Curran has taken this over. Need to put up a child wiki page for each type of notice and a screen shot of the current notice. Expect to do this by Wed. Curran will create the xmils to share with other campuses.
1/21 - Dineen: On the wiki. Curran will take the language and put it in xml for other sites to customize and share the notice language.
2/2 - Dineen: Curran has this. Everything is ready to go. Team portion of this is complete.
- 234 Review EL Training Materials**
Owner: Dineen Grow
10/14 - Dineen: Review EL training materials and add what is missing for training team
10/20 - Dineen: Sent to Paula S. who is vetting with Mitch. Emailed to Mitch. Meeting on Wed.
11/3 - Dineen: completed.
- 235 Update Questions for Alma Workshop**
10/20 - Dineen: Received questions from GB which have been responded to. Waiting to hear back from Melissa - this afternoon, then will send to Mitch.
11/3 - Dineen: complete.
- 236 Stopping UB - ILL Input**
Owner: Dineen Grow
10/14 - Dineen: Receive input from system ILL managers regarding stopping UB requests prior to cut-over
10/20 - Dineen: Team is reviewing this issue. Should have a firm date by the end of next week.
11/3 - Dineen: Firm date of 1/8. Note has gone out to Mitch, Karen and Curran for review. Will go to libraries-1. Cory is talking to the reserve folks (for madison). Will bring this up at the all reps meeting to determine how this will be discussed at the system level.
11/10 - Dineen: PR for faculty remains. Met with Lesley who brought a small group together to discuss the PR implications of Alma. What do we need to communicate? Initial conversations have been made. Will report to LSP on Tuesday.
11/17 - Dineen: Reported at LSP. Carrie Nelson and Ariel Andrea to take the lead for this campus. Now in the hands of Leslie and her group. Information will be returned to the team, but the team's role in this is complete.
- 237 Resolution on UB Patron Issue**
Owner: Dineen
1/12 - Dineen: Salesforce ticket in on the issues of mapping UB patrons. Need by the end of the week for the patron load action item - dependency. Will follow up with EL.
1/21 - Dineen: Conference call with Svetlana. Now understand what we need to do and how it works. will share that in the config meeting with EL on Monday.
2/2 - Dineen: Config is complete. Waiting to hear from all sites that everything is good. Will bring up at the All Reps meeting.
2/9 - Dineen: Complete. All configs are set or we know what to do.
- 239 Populate Alma KB**
Owner: Dineen
2/9 - Dineen: Have posted some material. Waiting for the circulation implementation team documentation. Expect a report back next Wed.
2/16 - Another 2 weeks for the report to be returned.
2/23 - Nothing new.
4/27 - Dineen: 5 more docs to go. Call in to Dave to learn how to do attachments. This will be what is needed for go live. Others to follow.
- 240 Post Testing Assessment - Resource Sharing & Eshelf**
Owner: Tech Data, Fulfillment, Discovery
2/20 - Mitch & Bruce: When functionality testing is complete and all tasks identified as critical are identified and tested. Under the protocols, each team performs functional testing. Work with all FTCs to determine if there are any outstanding functional issues. Discuss the state of resource sharing and eshelf with Discovery and Fulfillment. Deliverable: Risk analysis for Steering Committee including: what is resolved, what is not resolved, established workflows and workarounds. Establish go/no-go and/or

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strategy for isolated issues that are not ready but are not mission-critical to go-live. Dineen and Katie work with other FTCs to solicit input and then meet with Bruce. Bruce submits report to Mitch who takes it to Steering.

3/16 - Dineen: using existing meetings for communicating.

3/30 - Dineen: Continue Wed meetings review spreadsheet. Down to 3 issues. No mission critical. Testing the new fixes and discussing workarounds.

4/13 - Dineen: Complete excost for items in development. Multi-volume requesting is not in development - working on one more thing.

241 April Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

243 May: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

244 Testing - Clean Patron, Loan & Request Data

Owner: Tech Data, Fulfillment

2/20 - Customer data testing of clean patron, loan, and request data on prod (4 hours, TBA). Test offline transactions in Alma (1 hour TBA). Fulfillment Team interfaces with Campus Reps (coordinating with their fulfillment staff.) Fulfillment reports to Tech Data. Bruce reports to Mitch for customer acceptance of the Alma environment.

247 Project Close Activities

Owner: Each Team

Goal: Work with Tech Data to conduct final system status review and identify and resolve existing mission-critical issues at all campuses.

248 Resource Management Team

Team Members:

Susan Foran, Chair (Team Leader, Resource Discovery, Milwaukee)

Michael Cohen (Interim Head, Cataloging, Madison)

Joe Tomich (Resource Discovery Team, Milwaukee)

Michele McKnelly (Head, Technical Services, River Falls)

Bill Doering (Systems, Catalog and Digital Initiatives Librarian, La Crosse)

Karen Rattunde (E-Resources Cataloger/Coordinator, Madison)

249 Configuration Forms

Owner: All Team Members

6/24 - Susan: Has not posted the wiki yet, but will do so. Resource Mgt tab and the 2 controlled vocabulary tabs. Met last Wed, discussed location codes and how that falls between all of the teams. Getting direction from the Tech/Data team. Next step: need to send surveys and instructions out to the catalogers and campus contacts. Plan to discuss at next meeting and to make decisions and send out July 2.

6/30 - Susan: Did not have the discussion - tabled for the next meeting on Wednesday.

7/7 - Susan: Posted her recommendations. Draft. Still have questions from the interest group list. Will go through them and continue to update.

7/15 - Susan: Tabled until next week.

7/22 - Susan: Have not have much feedback. Team has not changed the recommendations, but they are not yet complete due to gaps in understanding consortial and campus interactions. Will be meeting with the CUWL Cat subgroup soon to get the results on a survey they are doing. 8/5, but should have their report before that. Team will review the form again and make sure the campuses have what they need to complete their forms.

7/28 - Susan: Sent a message to ExL for clarification and reply was inadequate. Had not changed the recommendation, but raised concerns about ExL compliance with RDA. Not as much in compliance as they claim to be. Additional discussion this week. Also, controlled vocabulary tab - thought it was a simple decision, but testing has led them to believe that the documentation is not correct. Will re-vist this on Wednesday to review.

8/5 - Susan: Controlled vocabulary - team has decided to leave them blank. Still waiting for responses from the Alma list on some minor points, but setting up controlled vocab. is not something we are interested in right now. CUWLCAT met this morning and are discussing the definition of indexing. Might be minor changes to the resource mgt tab after the team meeting tomorrow.

250 Migration

Owner: All Team Members

6/30 - Susan: Will have discussion at Wednesday's meeting.

7/7 - Susan: Posted draft form and narrative. Working questins from the lists and continuing to discuss and update.

7/14 - Susan: Reviewed recommendations. Discussed line 24 (Svetlana's recommendation). Susan will post an update to the wiki.

7/22 - Susan: Recommendations were updated. Will monitor wiki for questions. Done providing info to the campuses. Complete from a team perspective except for monitoring.

252 Master List of Data Clean-up Projects

Owner: William Doering

Goal - get the master list to people and let them know where to get help.

6/17 - Susan: Creating a gid of what the mandatory cleanup projects are for each campus and a strategy and tools to perform the cleanup efficiently. What to do, how to do it, and track that it has been done. Will approve a new version of the grid 6/18.

6/24 - Susan: Still working with the grid - not yet approved. Finish by the end of June. It keeps growing. Getting more questions about other MARC fields that they hadn't considered before.

6/30 - Susan: need to add scripts to the grid (or links to the GDC scripts). Need to check with Bill to see how far he is on this.

7/7 - Susan: no progress this week.

7/15 - Susan: no progress this week. This is behind. Does not affect the submission of the forms, but is holding up campus clean-up. Discovery team is also waiting for this. No holdup other than time. Will see where it is next week and look for mitigation if they haven't been able to get to this.

7/22 - Susan: Got it posted to the wiki. Getting feedback. Expect to have the list by 10/1. Will be making changes right up to that extract.

7/28 - Susan: No update.

8/5 - Susan: No updates. Campuses are making progress.

8/19 - Susan: Has reviewed Madison and likes what they are doing. Going to recommend they do something similar in this week's team meeting.

8/26 - Susan: Discussed the need to work with EResources team on this. Related to the 856 issue. Will be communicating more with Craig.

9/2 - Susan: Talked about breaking this up into smaller action items. Adding "child" items today.

9/9 - Susan: No new progress last week. Talked about other ways of doing it, but no conclusions.

9/16 - Susan: No changes to the master list yet. Still discussing 856. In draft form. On track.

9/23 - Susan: On issue - joint meeting with ER tomorrow, then will be publishing the list.

9/30 - Susan: Joint meeting is this week. Grid is ready to go except stuck on the 856 issue. Stout has asked about the consequences of non-compliance.

10/7 - Susan: List has been posted. Discussed Stout's question. Consequences fall to the campuses. On the agenda for CUWLCATS meeting today. Will issue a memo after. Complete

253 Develop Grid for Tracking Campus Progress

Owner: Michele McKnelly

9/2 - Grid for tracking database cleanup on all campuses. Aimed at catalogers. Will send a survey to the campuses.

9/9 - Susan: Discussed but haven't sent the survey. Intend to finish it tomorrow.

9/16 - Susan: Have a draft. Will discuss tomorrow and finalize and send out survey.

9/23 - Susan: Will finish the grid tomorrow in the ER meeting and post.

9/30 - Susan: Grid is nearly done and will communicate to catalogers.

10/7 - Susan: Michele published this. Complete.

254 Local Extensions

Owner: Susan Foran

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6/17 - Susan: MARC codes 59x, 69x, 9xx fields. Local extension is \$9 LOCAL. Each campus must evaluate each field and decide if they are retaining this data in their institution zone or are we losing this data.
6/24 - Susan: Discussion continues. Working on the 9xx fields to define for the config form under RM tab. Consortial decisions required. Has a document that she will post tomorrow for the catalogers. Spreadsheet of 9xx fields and usage. Need to reach a consensus about which fields to retain. Will be contacting Adriana about process for this item - EL recommendation runs contrary to OCLC practice.
6/30 - Susan: Waiting to hear from EL. Campuses are working on this. No difficulties so far. Will give EL one more day. They meet on Wednesday. Repeated the question on Alma-WI today.
7/7 - Susan: Posted question last Thursday and getting a lot of responses on 9xx fields. Discussion continues.
7/15 - Susan: CUWL cataloging group has appointed a subgroup to look into this. Waiting for their feedback. Does not remember the deadline for this, but it is soon.
7/22 - Susan: Did talk to someone on the local extension group. Should have their report very soon. Not related to campus config forms.
7/28 - Susan: No changes. Do not have their report back yet.
8/5 - Susan: Got a report. Will post to wiki. Have come to an agreement. Complete.

255 AQuery

Owner: Susan Foran & Bruce Barton

6/17 - Susan: Obtain and learn AQuery. Provide documentation to campuses. Everyone saw the demo at CUWL conference. Need to provide info to catalogers on how to use the data to do the cleanup.
6/24 - Susan: Complete. It is in use and working well.

256 Third Party Remediation Bid

Owner: Susan Foran

6/17 - Susan: Cooperative project with the CUWL cataloging task force. Working since mid-May to get a proposal together to go to the CUWL Steering Committee about the third party remediation. (how to send our bib data out to a vendor for clean-up authorized access points, obsolete MARC fields, and possible RDA upgrade)
6/24 - Susan: Proposal forwarded to the chair of the CUWL Cataloging Task Force. Will discuss at July 1 meeting to get a consensus. On target to get it to the SC by July 10.
6/30 - Susan: Meeting tomorrow to discuss.
7/7 - Susan: Had the meeting. Has submitted to the SC and have not had a reply. Susan will ask Michael if he has heard.
7/22 - Susan: SC and Mitch gave the go-ahead. Phase II - procurement process. This is post migration - no bearing on forms completion.
7/28 - Susan: Maureen has jumped in to help in Michelle's absence. Also Becca Peters from River Falls and Deb Strelka from GB.
8/5 - Susan: RFB was approved by CUWLCAT. Will go to procurement this week.
8/19 - Susan: Behind on the emails. In procurement right now. They are refining the requirements. Complete pending approval and RFP out. Won't happen until after go-live.

257 Locations

Owner: Michael Cohen

6/17 - Susan: Proposed locations. Work with the Fulfillment Team. Involves a consortial decision and needs to be complete to submit with the migration forms.
6/18 - Mitch: Does this need to be vetted with the Discovery team? Specifically location naming and effect on Primo.
6/24 - Susan: Meeting with the Discovery team tomorrow. Discussion continues.
6/30 - Susan: Met with Discovery. They have set the parameters and now a campus decision.
7/7 - Susan: Complete from the team perspective. Campus decision.

258 Plans for a Read Only Archive of Voyager Data

Owner: Susan Foran

6/17 - Susan: Work with Bruce Barton to ask about a read only archive of Voyager data and how long it might be retained. Emailed Bruce on the 11th, he responded on the 12, yes, the Forward team is working on this. Some things that will be lost in migration will still exist in some form. Bruce's team will work this issue.

259 Data Clensing-Vendors Identification

Owner: Resource Management

6/18 - Bruce: Reported complete.

260 Develop Policy Statements Subject Heading Thesauri

Owner: Susan Foran

6/24 - Susan: Added this item today. Currently querying campuses about MARC fields that they routinely delete. Need to decide what subject thesauri headings we need to support. Of particular interest are the FAST headings. Have developed some split policies that are creating "interesting" displays in Primo. Getting responses back.
6/30 - Susan: Still getting responses to the survey. Not compiled yet. Will discuss at the Wednesday meeting.
7/7 - Susan: Did not get to this at the Wed meeting. Tabled until next Wed.
7/15 - Susan: Was not on this week's agenda. Lower priority than config and mig forms. Will table for now. This crosses with Michaels CUWL cataloging task force. Need to begin addressing this again by beginning of August.
7/22 - Susan: Did talk to CUWL Cat task force. Looks like the recommendation will be to accept all subject heading thesauri. Need to coordinate this with Discovery to decide how to expose this in the Primo environment.
7/28 - Susan: No changes. Susan was on the Primo meeting with Katie last Friday and is following up with Katie. Susan will contact Katie and Craig as next steps. There is an issue unique to colleges and oshkosh that susan needs to know more about.
8/5 - Susan: Got a report from CUWL CAT. Will post to wiki today. Conclusion is to stay as is through migration. Complete. New item will be created post migration.

261 OCLC Local Holding Report & Connexion

Owner: Jay Dougherty & Susan Foran

10/6 - Bruce: Work underway on the OCLC local holding report and requirements around Illiad.
11/3 - Bruce: Illiad piece will be done by the patron group. Will review OCLC piece with Curran for next week.
11/10 - Bruce: Have not talked with Curran. Will do that.
11/17 - Bruce: Tech Data decided to pass this off to the RM group for testing. Susan is aware.
11/18: Moved from Tech data.
11/24 - Susan: Several issues. Communication with external resources needs to be set up with each user. Communications with OCLC for serials and holding reports for all items. OCLC gateways - know how to set them up. Forwarding an OCLC authorization so Dolph can set them up for us. Joe has been involved with this 3rd party integrations. Will break this down and itemize what still needs to be done by each campus. RM meets Wednesday and will discuss.
12/1 - Susan: 3 issues: OCLC connexion to Alma - know how to do that and the wiki page is posted. (how to set up the OCLC gateway within connexion) Need to confirm all campuses have set this up and tested it. (deadline before 1/20) 2. Configuration of Alma's Publish to OCLC job. Do we have to wait for post go-live? Need to find out from EL. Will send them an email asking. (deadline 1/20) 3. LHRs (local holdings records) post go live issue. Do this every 12-18 months. Need to decide how to do this. It is low priority for resource sharing purposes. Michael is working this. (deadline 6/30)

262 OCLC Connexion

Owner: Susan Foran

12/1 - Susan: OCLC connexion to Alma - know how to do that and the wiki page is posted. (how to set up the OCLC gateway within connexion) Need to confirm all campuses have set this up and tested it. (deadline before 1/20)
12/15 - Susan: A few campuses are having trouble with this. Will follow up.
1/5 - Susan: Tested this morning. is working for MKE. Will check with Michael to make sure it's working for everyone.
1/12 - Susan: No negative feedback from campuses. Campuses have access to the documentation for testing. Will talk to Michael and send out a poll this week. Deadline for replies of this Friday.
1/20 - Susan: Everyone reports success except Colleges.
2.2 - Susan: Everyone is reporting success. Complete.

263 Publish to OCLC Job

Owner: Susan Foran

12/1 - Susan: Configuration of Alma's Publish to OCLC job. Do we have to wait for post go-live? Need to find out from EL. Will send them an email asking. (deadline 1/20)
12/15 - Susan: No update.
1/5 - Susan: No update. Next step: Is this a single or batch? Assuming batch. Will follow up with the committee. Joe and Michael are working this.
1/12 - Susan: It's both a single and a batch. Requires setting up a publishing profile with OCLC. Can only be configured by each campus with OCLC after certification training because of access/knowledge derived from the training. Will provide documentation for how to do this. Set up after certification. Can't change it until after go-live. Will also have interim procedures about how to add local holdings in the gap.
1/20 - Susan: Did not yet post the interim procedures. Link to OCLC documentation.
2/2 - Susan: Need to get the documentation vetted and posted this week.

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2/9 - Susan: Need to get the documentation vetted and posted this week.
2/16 - Susan: No progress last week. Minor document. Need to run it the RM team and then post to wiki. Doc has not been written yet.
2/23 - Susan: No progress. Adapting an OCLC doc that exists and modify for local use.
3/9 - Susan: Document has been posted. Discussed at CUWL Cats. Everyone but Mad is already using something similar. Complete.

264 OCLC Batchload Procedures

Owner: Susan

3/9 - Working with OCLC service center to set up batchload of holdings from Alma. Will start with MKE and then publish how it is setup and done. Complete procedures prior to tech services freeze.
3/16 - Susan: Email from OCLC. Will follow up.
3/30 - Susan: Still need to follow up with OCLC.
4/6 - Susan: Meeting w/EL this week. Still need to follow up with OCLC. Will talk to OCLC first.
4/13 - Susan: Met w/EL. Got clarification. Karen and Michael set up batchload and LHR to be run as a test this week. Started dialog w/OCLC. Testing Madison today. Published OCLC is in play.
4/20 - Susan: EL did a last minute meeting that most people missed. Karen and Michael were there. The publish to OCLC job did not run successfully, but over the weekend they ran it again and it may have succeeded. Will follow up today.
4/27 - Susan: Sent instructions to all campuses - how to get their order done. They must get their project ID. Asked them to communicate their compliance. Still testing at Mad. Not going well. Does not know all of the details. Loos successful, but the numbers don't seem to match up. Mad is working this. Can't config while frozen now.

265 Local Holdings Records

Owner: Susan Foran

12/1 - Susan: LHRs (local holdings records) post go live issue. Do this every 12-18 months. Need to decide how to do this. It is low priority for resource sharing purposes. Michael is working this. (deadline 6/30)
12/15 - Susan: CUWL CATs met last week. Will check with Michael.
1/5 - Susan: No actions now, will resume 3/1.
3/9 - Susan: No progress. Runs every 16-18 months, but need to have an understanding. Scott Prater runs this. Will follow up with Scott to ask about process. Process will likely change. Must figure out how to extract the data from Alma.
3/16 - Susan: No progress. Will follow up with OCLC before talking to Scott.
3/30 - Susan: Still need to follow up with OCLC and Scott.
4/6 - Susan: Need to follow up with OCLC.
4/13 - Susan: LHR is being tested at Madison today. MKE to follow. Published bibliographic is the more important to test. (today)
4/20 - Susan: Scott and Jeff W ran the LHRs one last time in Voyager over the weekend. Good for the next few months. Will get batch load and local holdings configured.
4/27 - Susan: No progress this week. Doing the batch load first.

266 UW Systems RM Decisions

Owner: Susan Foran

11/24 - Need to develop a wiki presence to add content to UW Sys RM decisions. Decisions are being made by the CUWL Cataloging Task Force. An FAQ of the decisions that have been made. Consult it and add additional questions to be answered by the Task Force.
12/1 - Susan: Have not seen the minutes from the last meeting. They did identify a few more decisions. Will add to the existing wiki page. will later attach this to the FAQ Bruce is developing.
12/15 - Susan: No update.
1/5 - Susan: Task Force will meet again this week.
1/12 - Susan: Had the discussion about the KB and polycs, procedures, and training. Will begin posting policies as soon as possible. As soon as they are vetted. Procedures - start transitioning those to the KB now.
1/20 - Susan: Documents are being posted to KB. Will follow up with Michael about policy docs.
2/2 - Susan: Discussed at the meeting last week. Still vetting policies before posting. Some procedures are ready, but still on the wiki.
2/9 - Susan: No update
2/16 - Susan: Task force meets tomorrow. Drafts will be discussed.
2/23 - Susan: Did not get through the whole agenda at the task force meeting, drafts went back to committees for revisions - posted for comments. Next meeting again until 3/3
3/9 - Susan: Draft policies and procedures are being reviewed. Network Zone Overlay, Edit suppress and delete, holdings records, and item records. All in process. Drafts on the wiki. Some are being worked in sub-groups. 3/17 next meeting. Have the NZ report now, but still need some resolution on governance to complete these policies. Jim L. is aware of what is needed from Steering. Paula G. is sending out a survey re: the proposals for governance from the NZ report.
3/16 - Susan: Task force meets tomorrow.
3/30 - Susan: Heard that there has been movement but have not reviewed it.
4/6 - Susan: Karen R. is creating a wiki page for non-negotiable policies. Task force sent everything back for revision. Meet again tomorrow. Paula suggested she give them a date by which decisions need to be made so they can be written up, vetted, distributed, staff can be trained and have time to practice before go-live.
/13 - Susan: Michael will be putting policies on KB. Met last week, sent back for more revisions. delay is not affecting training. Would like to see them now so we could be testing. Asking the task force to get these codified.
4/20 - Susan: Policies and procedures posted to the KB. Discussion continues.
4/27 - Susan: Can go live day 1 with what they have so far. Task force is not in a hurry. Have interim procedures in place.

268 Develop Resource Mgt Rubric for Review

Owner: Susan Foran

7/28 - Susan: added this today. Go through the EXL doc for testing RM data migration. Will coordinate with Karen R (Tech/Data) during the testing.
8/5 - Susan: No change pending Tech/Data and Redmine discussion and setup.
8/19 - Susan: Discussed testing vs review. Changing title of this item. Have several good models that we are looking at and will get them out there as soon as the test data is available. Will then refine for remaining campuses.
8/26 - Susan: Getting test logins for team members.
9/2 - Susan: Have logins and are testing the data. Defining audiences, documenting processes for Redmine and Sales Force. Discovering areas where practice is not uniform among catalogers.
9/9 - Susan: Taking this to the team for clarification.
9/16 - Susan: Have not got things into the rubric, but discussing what should be there. Will discuss again in the team meeting this week.
9/23 - Susan: Testing did not go well this week. Rubric will not be completed until the end of this week.
9/30 - Susan: Abandoned in favor of testing protocols. Ending item.

269 Develop Mechanism for Reporting Results

Owner: Susan Foran

9/2 - Susan: Is the wiki the right place to communicate? Make sure the catalogers feel comfortable using the wiki. Will send out an informational email today about the cataloger comment space - where they can ask questions and comment.
9/9 - Susan: Have not sent the email. Working on the draft.
9/16 - Susan: collecting responses on the wiki. Communicated with the campus contacts. Michael gave her a contact list for campus catalogers and it will also be sent to them.
9/23 - Susan: Will send out an email to the catalogers about the new wiki space for data review and functionality testing. Mechanism is the wiki work area and it is complete and comments are being collected.
9/30 - Susan: Results are being recorded. Complete. Will continue to collect issues and work in Redmine.

270 Develop Decision Process - EL and UW Issues

Owner: Susan Foran

9/2 - Susan: Triage of issues and comments. Determine that they have been dealt with and what the decisions were. Also, sort between UW and EL for discussion and decision making.
9/9 - Susan: Discussed with Michael's team - will be working with them. Testing now and discussing process. Getting a list of who the senior cataloger is at each campus. for purposes of communication.
9/16 - Susan: Have the list of catalogers. Created a wiki space for tracking post-migration system-wide issues. Michael has created an issue outline.
9/23 - Susan: Space has been created on wiki. Discussion in progress. Need to create a flow chart - has a draft, and will get that to the team for approval.
9/30 - Susan: Found the flow chart. Will discuss at this week's team meeting.
10/7 - Susan: Still in the draft stage. Will be discussed in today's CUWLCATS meeting.
10/4 - Susan: Under discussion. Discussed at CUWL CATS. Need more communication with the cataloger community with regard to how decisions are made and communicated. Stuck in creating the process. Being passed around via email and keeps getting torn apart. This is about bib data. What does the cataloger do when they see an issue? Paula: recommending Susan talk with the Testing sub group and get a workflow for identifying and reporting cataloging issues. Paula sent Maureen an email.
10/21 - Susan: Did not discuss with Maureen. Will call her right away. Did distribute the flow chart to the team.
10/22 - Mitch: Susan attended the Tech/Data meeting yesterday and heard the process for testing feedback. Post migration - what do we do for documentation moving forward and documentation for practices? These are questions that are in discussion. Where will this documentation be kept?
11/3 - Susan: Committee approved the flow chart and created a triage schedule for Redmine. Schedule is posted. Will also post the flowchart to the wiki. Complete.

271 Testing Protocols - Functionality

Owner: Susan Foran

8/26 - Susan: Related to the Mgt Rubric. RM team members will be testing functionality.
9/2 - Susan: Discussing in weekly meetings. Waiting on the sub-group (Michael, Maureen and Terri) who will return things to the functional teams on testing protocols. Michael didn't have much to report today.
9/9 - Susan: Sub group has been formed. Will discuss at the team meeting tomorrow.
9/16 - Susan: The sub group is discussing preservation issues. Notes are valid and migrating, need to decide what we are doing with those notes going forward. What requires enhancement requests? Curran has created Redmin issues, Susan will read those and familiarize.
9/23 - Susan: Last week - Michael agreed to fill out a draft for testing protocols in the space that Bruce provided on the wiki. She will ping Michael to make sure the protocols they came up with have been posted.
9/30 - Susan: Protocols are posted. Complete.

273 Populate Alma KB

Owner: Susan Foran

2/9 - Susan: Have not posted any material yet. Documents need to be finished and vetted. Will follow up with Michael who may have some items to post. CUWL CATS meets on 2/17. Subgroups will come back and report on drafts of policy.
2/16 - Susan: Meeting is tomorrow and will get new drafts. No current docs to post.
2/23 - Susan: No new drafts from the meeting. Still getting comments.
3/30 - Susan: Joe is putting NZ docs on the KB.

274 Post Testing Assessment - Resource Sharing & Eshelf

Owner: Tech Data, Fulfillment, Discovery

2/20 - Mitch & Bruce: When functionality testing is complete and all tasks identified as critical are identified and tested. Under the protocols, each team performs functional testing. Work with all FTCs to determine if there are any outstanding functional issues. Discuss the state of resource sharing and eshelf with Discovery and Fulfillment. Deliverable: Risk analysis for Steering Committee including: what is resolved, what is not resolved, established workflows and workarounds. Establish go/no-go and/or

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strategy for isolated issues that are not ready but are not mission-critical to go-live. Dineen and Katie work with other FTCs to solicit input and then meet with Bruce. Bruce submits report to Mitch who takes it to Steering.
3/16 - Susan: Will be on vacation next week. Will let Bruce and Maureen know so they can get what they need this week and also know who the go-to person is in her absence.
3/30 - Susan: No update.
4/6 - Susan: Michelle is drafting a doc for the 6 hour testing period.

275 April: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.
4/13 - Susan: complete.

277 May: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

279 Post-Migration Clean Up Plan

Owner: Susan Foran

9/23 - Susan: 3 phases: 1) tracking post-mig issues as we find them and tracking on the wiki 2) Develop a Post mig plan in conjunction with the cataloging task force on 10/7 3) Need to develop shared policies and procedures for shared cleanup.

Step one is complete. Created a space on the wiki called Post Migration System-Wide Issues in the RM area.
9/30 - Susan: On agenda for CUWL meeting on 10/7.

10/7 - Susan: Meeting today.

10/14 - Susan: Announced the wiki space at CUWL CATS. Invited them to post things there. Did not begin developing the plan - did discuss. Need to see the non-mig list before the plan can be developed. Paula: Recommended drafting an outline of a plan based on what can be done at each staff level and what the long term plan is. Some things can be caught up front, others will take time. Also, Susan mentioned the new tool that they haven't seen yet and won't until after go live. Remains to be see how helpful that tool will be.

10/21 - Susan: There is a place on the wiki and will start using this for plan discussions and posting a draft.

11/3 - Susan: RM met last week and discussed. Michele drafted a list of "thorny issues." Will publish after the CUWL/CATS meeting tomorrow. Will discuss with Michael how to move this list into a clean-up plan.

11/10 - Susan: Michael posted the doc on RM wiki. Team is making edits to the document. Susan needs to review the edits. Right now it is a list of decisions that have been made. Desisions are about how to correctly handle fields, what to import, where to import from, where to import to, how to edit. Still collecting the parameters of what will need to be cleaned up and what power we will have to perform clean up. Paula suggested she chat with Dineen who has developed a clean-up strategy to help define this activity for RM. Susan will also talk with Michael again.

11/27 - Susan: Trying to figure out who those network zone admins have to be and what actions they have to take. New info over the weekend she hasn't had a chance to read yet. So, some cleanup plan ideas are up in the air again. Will review the documents and revise.

12/1 - Susan: No update on this item.

12/15 - Susan: Posted update to the post migration document. Sketchy, but up.

1/5 - Susan: Posted and complete.

280 Third Party Remediation Bid

Owner: Susan Foran

9/30 - Susan: Meeting this week to review the bid and discuss add ons offered by the vendor.

10/7 - Susan: Sub committee met. Turned down all of the vendor add ons. Now with the SC to talk about when we can do these jobs. (break the data load into bits to send portions out to be cleaned up without disabling UW System's cataloging). Cannot change bib data while data is being cleaned. Bid is done.

281 Complete Processing Profile

Owner: Susan Foran

9/30 - Susan: Sub committee needs to review the processing profile, submit to the vendor, submit a file to the vendor to test against the profile. Testing process will go on.

10/7 - Susan: Waiting for word on the contract from SC and some questions for EL.

10/14 - Susan: Waiting for status of the contract with marchives. Working with EL about how big the loads can be and if the process is underway and doesn't complete by 6/30, can we encumber the funds. Michael is relaying the communications. Paula: will follow up with Mitch re SC decisions.

10/15 - Mitch: OK to wait for now. We will continue to work with EL on the details. May be putting them in touch with the RM team as we begin testing of these items. The work itself may be pushed out until next summer. Deadlines: Dec18 - EL needs to confirm agreement that they can facilitate this work. Also, Cate B. is investigating the request to encumber funds into fiscal 2015-16.

10/21 - Susan: EL has never done remediation with NZ before. We won't do the profile until the contract is signed. Marchives contract was signed last week, so can begin to work this now. Will follow up with Jim today. Will also connect with Michael about where we are with filling out the profile.

11/3 - Susan: Reminded Adriana that we are still waiting for EL to tell us how they will do these batch extracts and reloads. Have until 12/19 to sign the contract with Marchive.

11/10 - Susan: Not aware of a response from Adriana. Will check with Michael. After we hear from EL, complete the processing profile and send in the first test file. This will be done by Tech Data. Karen R is the liaison to T/D.

11/24 - Susan: Mitch updated on this last week. Subgroup has not met since then. Have until 12/19 to sign contract. Will do the remediation over the summer. Extending the date. Want to determine now what we want to ask Marchive to do - specifics with regard to known issues. Still collecting issues as we go through the testing process. Would like to have the profile done by April.

132/1 - Susan: Have not met on this.

12/15 - Susan: Given the go ahead for the contract to be signed. Will meet to do the profile.

1/5 - Susan: Will continue 3/1

1/20 - Susan: Meeting with Michael and Marchives at ALA. EL would like us to delay this until third quarter of 2015.

2/2 - Susan: One decision away from having this complete. Also, who at Sys. will put their name on the document. Michael is finishing.

2/9 - Susan: NZ group is working the question.

2/16 - Susan: Waiting to hear who at system was going to put their name on this. Michael C. is checking on this. Have informal feedback from the NZ team. Need to have someone in procurement who will put their name on the profile. Will talk with Michael tomorrow.

2/23 - Susan: Made the decision on the last piece. Do not know if we have a signature yet.

3/9 - Susan: Haven't heard about the signature. Haven't heard from Marcat. Will ask Michael.

3/16 - Susan: Forgot to talk to Michael. Will do it this week.

3/16 - Email from Susan. This is complete. Signed by Sasi Pillay

283 Project Close Activities

Owner: Each Team

Goal: Work with Tech Data to conduct final system status review and identify and resolve existing mission-critical issues at all campuses.

284 Discovery Team

Team Members:

Katie Sanders, Chair (Systems Librarian, Colleges)

Terri Muraski (Coordinator of Information Technology, Stevens Point)

John Hubbard (Research and Instructinal Support, Milwaukee)

Sue Dentinger (Systems Librarian, Madison)

Bryan Vogh (Head of Library Systems, Eau Claire)

285 Configuration Forms

Owner: All Team Members

6/23 - Katie: Team reviewed last Thursday and made a recommendation. Mitch sat in. Later in the pm it was forwarded to the chairs to be vetted by their committees. Next week - discuss with campus contacts. Get feedback from the chairs in Thursday's S&W meeting, then send it to the campuses for comment. This is the only team task for the configuration form. (institutional name and library name).

The team is not populating a configuration form. It is making recommendations only. Therefore, It will not be posting the form on the Team landing page. Katie will post the recommendations.

6/30 - Katie: Sent it off to the contacts and have had some feedback from Oshkosh. Sent it to EL and have not heard back yet. Needs reply for tomorrow's 1:30 pm meeting. Will ping the list again to remind EL.

7/7 - Katie: met last Thursday to revisit config. Update to Mitch. Only change - relaxed the verbage on the library name - posted to the wiki. Because we are able to overwrite the library name in Primo, they can choose what they want in Alma, we may shorten in Primo.

7/14 - Katie: No further updates.

7/21 - Katie: No word from SC. No changes to make. Recommendations are done and this team does not have tabs to complete.

7/29 - Katie: no change, but Mitch has taken over the library discussion.

8/4 - Katie: Form is on the wiki. Does the team need to revisit library naming code? Will follow up with Mitch. Can change display names in Primo after go-live. Otherwise, complete.

286 Migration

Owner: All Team Members

6/23 - Katie: Recommendation for configuration also covers the migration forms. Recommendations are being vetted with FTCs this week and campus reps next week. This is the only team responsibility in the migration forms.

6/30 - Katie: Sent it off to the contacts and have had some feedback from Oshkosh. Sent it to EL and have not heard back yet. Needs reply for tomorrow's 1:30 pm meeting. Will ping the list again to remind EL.

7/7 - Katie: met last Thursday to revisit config. Update to Mitch. Only change - relaxed the verbage on the library name - posted to the wiki. Because we are able to overwrite the library name in Primo, they can choose what they want in Alma, we may shorten in Primo. They are ready to go unless a vote is necessary on the recommendations. Otherwise, team has finished this item.

7/14 - Katie: has had questions from Michael re: "stacks" but this should go to resource management. OK'd RMs recommendations. He may not get a clear answer by Friday.

7/21 - Katie: No word from SC. No changes to make. Recommendations are done and this team does not have tabs to complete.

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7/29 - Katie: no change, but Mitch has taken over the library discussion.
8/4 - Katie: Complete.

288 Review How Archival Materials Display in Primo

Owner: Katie Sanders

8/12 - Katie: Wondering where the holdings records show up. Need to talkwith Bruce (on vacation this week) Question re: WHS owns things, but they are on permanent loan to UWS archives. Need to be able to search by what the WHS owns. Need Susan in the discussion.
8/19 - Katie: Need to meet with archivists to discuss this matter further. Katie will talk with Susan about scheduling a meeting and whom to invite.
8/26 - Katie: Waiting for the box. Will need samples from Mad and MKE data.

9/9 - Forming a new sub team to review archival issues, Bryan, Greg (Chair of UWSAC), Alice (SHS), Crystal from UWM, still looking for a cataloger

9/16 - Katie: Organized the sub team. Bill Doering has agreed to be our cataloger. They will be meeting on Thursday.

9/23 - Katie: Lee K. is also helping out. Katie emailed Cate to set up a list. Meeting time has been scheduled on Fridays. May need to consult with Dineen. They do not want archival materials to be able to be UBD. Need statuses to be set up properly for the item type archival matrials, must finish no later than 11/14.

9/30 - Katie: Did not meet because of the training event. Emailed Alison to get more info. She replied and clarified some information. Need to find out how they envision pickup and paging to work in Alma. Discussing via email. Will meet this Friday.

10/7 - Katie: Configured over the weekend. Now can check to see what fields we need to add.

10/14 - Katie: Meeting scheduled this Friday. Renorm resolved some issues, but there are others that need to be resolved.

10/21 - Katie: Email out to Bryan requesting minutes for the meeting. The did review how materials display and what items in the tab need to display. Need to activate some fields that are missing.

11/4 - Katie: Meeting with Terri and Karen R, and archives folks on Friday. Will review Madison's issues because the data are available. Also review what the details tab group has come up with.

11/11 - Katie: Have a fairly complete list of what the archivists need. It's been reviewed by the team. Next steps: Turn over to EL and/or there are a few things that will require SF tickets because they are not in the norm rules. Will not be able to test until Dec because not all of the Primos are delivered yet. (Week of Thanksgiving).

11/18 - Katie: Bryan will call an archivies meeting for Friday (internal). There will also be another EL meeting. Yesterday's EL meeting demonstrated that EL did not understand all they've been told. They are working among themselves to work though this and we'll meet again. Marina has put the norm rules in place and built the scope for Madison, so it should be possible to test for Madison.

11/25 - Katie: Meeting today. Discussion continues via email. Looking to Bruce and Mitch for direction. Will review what changes have been made so far. Review the way we are scoping and labeling things.

12/3 - Katie: Met today with EL. No resolution. EL is working on recommendations. They did not build the scope to our specs. These tweaks cause additional renorms to be necessary.

12/9 - Katie: met yesterday. The did build the scope. Karen has joined the team and is going over the data. Next step is to follow up with Karen at the end of the week. Bryan has stepped back. Will talk to John at UWM to help with coordinating meetings, take notes, do doodle poles, etc for archives.

12/16 - Katie: Mitch has Sue D. taking over coordination of this. Caught her up on the email threads. Need to settle the scope by Friday - before the norm rule changes. The build appears to be correct. 4 years will need to set up a form for requesting - EL is working on the logic.

12/23 - Katie: Met last week. Archivists have agreed to relabeling archives and special collection. Change has been made. Cleanup work has been done. Renorm tonight. Outstanding issues: Allison; still not on board with the request form yet. Postponing until post go-live.

1/6 - Katie: One outstanding issue - non-archival are junking up the faceting. Following up with Sue.

1/12 - Katie: Followed up with Sue. She emailed the archives group. Waiting now for a new go-live date.

1/20 - Katie: meeting with Archives group on Friday. Hope to see what they decide.

1/27 - Katie: Met last week. Reviewed the display and how they envisioned doing checkout. Archivists are meeting this week to discuss what changes they want to make to the search. Renorm may be necessary around spring break. Also, how do they envision checkout? May need to draw up our own rules. Circ matrix is five groups. May need to add a sixth group for archives. Currently under noloan. Will work with EL to configure this property.

2/3 - Katie: Will send out questions today and will meet with EL Thursday pm. Have not heard back from the archives group. Will touch base again.

2/10 - Katie: Asked EL to set up archival terms of use for Mad and MKE. They are moving forward. Also working on setting up the logic for Mad for 2 request forms, archives and WHS. Will follow up with Sue today for locations. Also building logic for UWM to hide the request form for AGS collection.

2/17 - Katie: Martina emailed today. Set up the archival terms of use for the scope to be based off of indicator A. That should get rid of the special collections for MKE, Mad, and RF. Set up dual forms for Mad. Next step: test.

2/24 - Katie: Issues: Scope discussion from last week fell apart. When Sue returns from vacation, need to come up with a plan for scope and set a deadline. The archivists and campus contacts can't agree. Will check w/Mitch for a deadline. Also: setting up the archival terms of use working with Dineen. MKE and WHS needs assistance. Also, special collections - Madison's has been forwarded to Mitch. Waiting for WHS and MKE to reply with locations. Need EL to build logic to hide request forms. Will schedule a meeting with MKE after talking to Sue.

3/3 - Katie: Talked to Sue. Will give them until the 11th to make changes. Trying to get them to agree to one form. MKE has objections. Discussion continues.

3/10 - Katie: Mitch contacted EL to ask them why they need the location codes. MKE doesn't want the display logic done for AGS. Do they need it for the setup of the TOUs? They are incorrect in the preliminary testing. Waiting for response from EL. Other issues: Have until Wed to finish the form and get it approved. Next week meeting with EL about norm rules. Then can work with the display logic for archival materials. WHS appears to be on board with the form.

3/17 - Katie: Meeting with EL on Thurs. Form is complete. Sent to EL to put in place for campuses. Will do a demo Thur of the circulation piece between Mad and MKE. Will also bring up the display logic.

3/24 - Katie: Svetlana set up the form and the views. Will touch base with Sue about communicating to the contacts the setup for terms of use.

4/7 - Katie: Archivists voted for option 2. Sue will make that happen. Sent out an email explaining how she will do it for them. Steering has approved this. Next step: check when Sue is done - display logic for the form. Also need to finish the configuration for archives w/Dineen.

4/14 - Katie: Still in favor of option 2, but they want to call it different things at different campuses. Goal is consistency. Sue fixed the view for everyone and put in the name. Some want the home campus first or after HSA. Also, display issues in Primo, call number does not display if it is not at your institution. Need for the request form. System architecture does not allow for this. Will bring this up with EL tomorrow to see what can be done. Work around - can look it up in Alma.

4/21 - Katie: Call number issue - said no to. Tabled it for post go-live. Display - complete.

289 Archival Circulation

Owner: Sue, Dineen, Katie

4/7 - Katie: Configure Alma so archivists can circulate materials to one another's reading rooms. EL and Dineen have set up most of this. Meeting this Friday to talk with Karen and Allison - how to move the inventory from the Mad Arcat into the appropriate ARC.

4/14 - Katie: Meet with EL tomorrow. Inventory is in the wrong IZ - all is in the Mad IZ regardless of campus. Needs to be in the home IZ. Karen has found a way to export based on location, import and create new holdings w/items, however, that creates duplication. HS issue: only have access to the Mad IZ and want to be able to see everything. Can this be solved with rights to campus IZ? Is there read-only?

4/21 - Katie: Tested last week. Got good feedback. Reported out to EL last night. Dineen and Alison reviewed. EL corrected EC and verified. One item from LC never showed up. Trying again. EC&SHS could not select archives location when shipping. EL can look at this after 5/13. Minor issue. Also, need to test Stout who did not respond.

4/28 - Katie: Rewrote EL's instructions. Dineen reviewed and corrected. Terri will also review and edit, then will be done. Need to follow up with Stout's config changes on 5/13.

5/12 - Katie: Circulation is ready to go. Sue edited the forms because the call numbers do not show up in Primo. There is a different way to set up Primo and Resource Sharing - discovered at Eluna. Mitch is aware. Complete for now. Changes can't be made until sandbox delivery.

290 New Primo Box

Owners: Katie Sanders & Sue Dentinger

6/16 - Katie: Estimated delivery date. May have to pull in Jay Dougherty from Parkside for server set-up.

6/18 - Mitch: All contingent on EL delivering the new Primo environment in August.

292 Migrate Custom Web Pages

Owner: Katie Sanders & Sue Dentinger

6/16 - Katie: Some campuses are hosted on the existing server, some are self-hosted. Alon at Ex Libris said on 5/30 that there is a new way to host web pages that will allow campus contacts access to the server.

7/21 - Katie: EL should be migrating these for us. We will verify migrated in entirety and have all campuses check once main box is live.

8/4 - Katie: Met with EL, they are migrating it for us. We will wait until the delivery of the primo box early August and can do more then.

8/12 - Katie: Nothing new. Waiting for Ex Libris to deliver the box. Do not have a new delivery date from EL. Will email Mitch to discuss with ExL.

8/18 - Katie: Changed the dates to Sept. for delivery of the Primo box.

9/9 - Katie: Will follow up with test campuses this week.

9/16 - Katie: Did not follow up. Will do this after we get back office access.

9/23 - Katie: Emailed the 3 campuses and didn't hear back. Will send again.

9/30 - Katie: Customized web pages are all there and working. Complete.

293 Configure New Primo Central

Owner: Katie Sanders

6/16 - Katie: For each campus. Alon said on 5/30 that we will go from one joint consortial account to individual logins.

8/4 - Katie: Met with EL, they are migrating it for us. We will wait until the delivery of the primo box early August and can do more then.

9/9 - Katie: Mad and RF are complete. Waiting to hear back from UWM.

9/16 - Katie: UWM has finished. Have forwarded to Marina. Can take up to 2 weeks for the resources to show up. Will send out a testing email the end of this week to begin.

9/23 - Katie: Emailed the 3 campuses and didn't hear back. Will send again.

9/30 - Katie: River Falls is still getting errors and Web of Science is not working for any of the campuses in comparison with production. EL has not responded to the reported issue. Configuration is complete. Will continue to work the issues.

294 Revisit Usability

Owner: Katie Sanders

6/30 - Katie: next step, she will email Terri and Michelle to talk about sending out a survey.

7/7 - Katie: Asked Mitch if the box would be delivered on this scheduled and he thought yes. Has emailed Terri and Michelle about doing a survey. They meet Thursday and it will be brought up again.

7/14 - Katie: Emailed Michelle. Waiting for her reply. She has a start on it, so they will wait for her. See if she can forward by next Thursday, if not, they will move ahead (Michelle is on medical leave)

7/21 - Katie: Have not heard back from Michelle. Terri is having a SC committee meeting this week. Will add survey to the agenda.

7/29 - Katie: Terri and Lisa and Katie will be taking over the survey. Hope to connect later this week.

8/4 - Katie: Terri raised an issue because Mad doesn't not completely do Primo. Katie suggested we need to do this campus by campus. Will need to separate it out by institution. Not sure of next steps. Terri is on vacation. Katie will touch base with Lisa and continue to discuss. Are they still interested in the survey? Split it into sections: digital collections, all UW System content (Voyager), article search (Primo Central). Mad will only use article search. Ask on the survey what campus they are from, class level (fresh, soph...). Ask them to complete find requests - test if they can do it with the new interface. Need to discuss if the student survey would be helpful. Campuses would have to run the survey - Discovery would make the questions. Alternative: survey staff instead of students. Alternative: post go live turn it over to the Primo Steering Com. to do testing.

8/12 - Katie: Met with Lisa and decided to delay usability until after go-live.

295 Planning for Usability

Owner: Katie Sanders, Lisa Saywell, Bryan Vogh, someone from Oshkosh

Offer a survey template, can be customized per campus, and do task analysis and guidelines.

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1/27 - Katie: Bryan and John will work on scripts and rubric to give a grade to our Primo interface. Need to quantify what isn't right. Asked for funding for additional testing. Steering is discussing.
2/3 - Katie: Talked with Bryan. Susan Lindal may be stepping up to cover for Marlys' absence as acting director in March and Bryan may need to step off the team. John is fine with doing this at UWM in their lab. Waiting for steering's decision for the money. Will test with Fulfillment. Do not expect right now to need a new team member for this.
2/10 - Katie: Approved the money. Followed up with John. Is discussing with usability lab re: money transfer. Lab is booked.
2/17 - Katie: Will call John. Need to clarify the division of labor on this item.
2/24 - Katie: Talked with John and clarified.
3/3 - Katie: John got IRB approval from UWM. Moving testing to the beginning of April. Complete.

296 Usability Testing

Owner: Katie

2/24 - John will be ready to test by April
3/17 - Katie: John will try to move this up a week depending upon the renorm so he can have the results in by 4/7.
4/7 - Katie: John is on vacation this week. Got everything set for MKE last week. Communicated to usability lab. Starting today. John may check in this week with an update.
4/14 - Katie: John has 10 sessions booked. Will wrap by Friday.
5/12 - Katie: John turned it in - forwarded to Discovery and Mitch. Sent to Steering and Primo Steering. Complete.

297 Primo Upgrade

Owner: Katie, Sue, Terri

4/7 - Katie: Will do an upgrade either on the 19th or the 26th. Will do review and testing post upgrade and decide if another renorm is necessary - EL will let us know.
4/21 - Katie: 2 ticketed issues. Backoffice is not secure. Emails are not getting to us - were before. Ticket has been updated. Emails arrive after several hours in Mad, but others get nothing.
4/25 - Katie: Mitch followed up with Alon yesterday.
5/12 - Katie: This is OK. Back Office is still not secure. Coming in July. Emails are getting to us now. Complete.

298 Resource Sharing Issues in Primo

Owner: Katie Sanders

9/30 - Katie: Does not work for Madison. There are multiple other issues with RS. Meeting with EL later this week. Question of how it should function. They are currently making UB turn into ILL.
10/7 - Katie: Meeting w/EL today.
10/14 - Katie: Fulfillment tried to do what they were shown in the EL meetings last week, and they are lacking the permissions to see everything. Discovery's concern: staff intervention will be required because they are using title and ISBN for match points for requests - used to be on the item bar code. Accuracy rate will drop and there is a known issue with their ISBN match with characters other than numbers - it will fail. May have to develop a work-around if EL can't change it. Disc and Ful teams need to continue testing by requesting back and forth. When all campus data is available, need to test this hard. Also need dummy accounts for all campuses to make sure we can test for them because some are short staffed.
10/21 - Katie: Meeting w/ Dineen's team next Wed. Will test face to face. Will review the request tabs and discuss labeling options and send to EXL.
11/4 - Katie: Environment was not delivered on time, so could not do this. Could see Primo, but the environments were not in sync. Could not test. 11/17 is scheduled as a working day for this item. There could be real issues here. Katie has concerns. Will know for certain after the meeting on the 17th.
11/11 - Katie: 11/17 will not be used for this topic. Waiting to hear from EL about a RS meeting with Ful and Disc. This is a mission critical issue. Needs to be resolved before the end of December or talk about moving go-live. Katie will email dates and times for meeting to EL.
11/18 - Katie: Talked with Dineen. They are testing in Alma (not Primo). She will be ready about 12/1. Mitch appointed Bruce to coordinate testing between the 2 teams. Katie and Dineen will create a spreadsheet for testing issues.
11/25 - Katie: Met with Dineen. Walked through testing. There are issues. Have a testing plan and shared it with Bruce and Maureen. Having a high failure rate - working to discover the cause.
12/3 - Katie: Met with EL today. Will find out Monday about the high failure rate (new release). Will talk with Sue D. about testing on Monday.
12/9 - Katie: Have new release. Failure rate has improved. Will follow up with EC to test their rate. Will discuss on Thursday to see if they should meet with Dineen on Monday to review madison test results.
12/15 - Katie: Meeting w/Dineen Thurs. Does not appear to be working very well for Colleges. Configuration keeps changing.
12/23 - Katie: Set up a testing worksheet. Have reviewed them and percentage is too high. Ticket is in and discussions around go-live date are taking place. Title, if it is vague, will result in multiple matches and fail. This does not sound like a campus configuration issue. EL is working this and Mitch is monitoring.
1/6 - Katie: Autofill is working for materials we don't own. Not working for AV, including things we own. Real issue is testing sheet. EL is just counting, not testing. Didn't tie it to a unique identifier. Have emailed Mitch to follow up. Met with Sue and Terri yesterday and went through the spreadsheet. Started from scratch. Finding locate errors in lending. Fails coming out of Primo, fails in Alma borrowing (to locate), fails in lending, don't know why. Mitchell Scott put together a spreadsheet, posted to wiki, sent to Mitch. Waiting to hear back and then will send it out as well. Need to continue looking at the data to try to figure out what's going on.
1/12 - Katie: Waiting for a new go-live date and more info on a working solution from EL.
1/20 - Katie: Dineen is testing the ROTA and it doesn't work. Mitch needs criteria - working that.
1/27 - Katie: Met with EL yesterday. Attempting to fix the terms of use. Have a spreadsheet of open tickets and updating regularly. Sent to EL. Maureen will review and consider ways to construct testing.
2/3 - Katie: Continue to find issues. Doing targeted testing. Met with Mitch about the spreadsheet.
2/10 - Katie: EL told Mitch that they might have a new RS item - will be getting him more info. We continue to test. Spreadsheet issues are being worked. Looking for the cause of the request delay.
2/17 - Katie: Discovered additional issues after last week's testing. Continuing to test and report in SF.
2/24 - Katie: Dineen sent email to contacts to clear their shelves. Meeting weekly with EL.
3/3 - Katie: Dineen sent spreadsheets. Will review them.
3/10 - Katie: Reviewed the spreadsheets. Will check in with Dineen this morning to see if there is anything new. Primo looks good except for quotes in a title. Will open a ticket in SF for this issue.
3/17 - Katie: Everything looks basically OK, there are still a few issues. EL is making workarounds into workflows. They are closing tickets afterward. Will ask EL to move the ticket into an enhancement request to keep it alive.
3/24 - Katie: Email to Dineen about a couple of questions. Will follow up. Enhancement requests have been put in. Will discuss what else needs to be done. Testing EL's last updates.
4/7 - Katie: Still issues outstanding. Have gone through the tickets and communicated to Mitch. Ready to sign off on this.

299 Primo A-Z List

Owner: Katie Sanders

7/21 - Katie: Started last Thursday. Melissa forwarded this from EResources. Part of SFX, but once we move to Alma it will be part of the new Primo interface and need to be built.
7/29 - Katie: Found out on Friday EL will primarily set this up for us with data populated from the SFX migration.
9/9 - Katie: Will review in today's meeting.
9/16 - Katie: ExL will set this up for us. We will test it in the new environment. Complete

300 Open URL Screens

Owner: Katie Sanders

7/21 - Katie: Part of SFX, will be part of Primo and replace the Find It menu. All campuses will need to customize the new screen. Team will come out with instructions for this.
7/29 - Katie: All campuses will need to do this.
9/9 - Katie: Met last week. Are not able to edit them yet, but they will be edited in Alma. Mitch wants to set up a second meeting with EL to review this.
9/16 - Katie: Got from Marina yesterday. Will post to the wiki - template and instructions.
9/23 - Katie: Posted to the wiki.
9/30 - Katie: Just got Back Office access this week to Primo. This will allow half the editing. The other half waits for Alma access.
10/7 - Katie: No progress this week.
10/14 - Katie: Will look at this on Thursday.
10/21 - Katie: Have a "mini" team designated for this. reviewing the instructions from EL. They may delay and keep SFX, so proceeding slowly until after the training to see what the ER team decides.
11/4 - Katie: Don't have a decision from Craig's team. Know where it needs to be loaded, but need his decision.
11/11 - Katie: John, Craig, and Katie will review this at the meeting this week. Curran may also participate, she will ask.
11/18 - Katie: No new progress last week. Intend to finish this week.
11/25 - Katie: John has stepped up and taken this over. Working on CSS and the Primo piece. He thinks he has some things worked out. Will recap next week.
12/3 - Katie: John and Jim at MKE are working this. Made significant progress. May have instructions for campuses for the Primo part by next week.
12/9 - Katie: Have instructions. Waiting to hear back from Jim.
12/16 - Katie: Haven't heard back from Jim. Looked at John's code. Works for Colleges. Iframe piece needs editing. John will work with Jen. Working on the instructions.
12/23 - Katie: No update yet. Jon is out this week.
1/6 - Katie: Have not heard back from John. Sue is working with Madison staff to load it and test it.
1/12 - Katie: Sue has updated the ticket, but EL has not updated since. Pinged them again this morning.
1/20 - Katie: Sue reminded Mitch to remind EL - they are holding it up.
1/27 - Katie: Sue and her crew are looking at this to see what actually went into effect. It looks like they didn't do much.
2/3 - Katie: Need to know when we will get access to back office. Then can finish this.
2/10 - Katie: Have access. Meeting today to discuss coding. Hope to wrap this up this week.
2/17 - Katie: Sue and Curran are working the technical aspects. Very challenging. Using secondary CSS to call the original one. Sue may have to put in a ticket. Works on some things but not others. Will check with her later today.
2/24 - Katie: Sue looked at it and did some work before her vacation. On hold until she returns.
3/3 - Katie: Figured this out. Problem on the Primo end. Has been corrected by EL. Working on UWM to do the change as well. Sue is putting the changes into the system for the other campuses.
3/10 - Katie: Complete. Instructions are posted. 3/27 deadline for everyone to set it up.

301 Redo the Norm Rules for Primo

Owner: Katie Sanders

7/21 - Katie: Work with Susan Foran. She set up the original norm rules. (normalization rules) Will start from scratch especially with regards to the details tab and some of the other ways records display.

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11/4 - Katie: Met last week and reviewed the 2 norm rules. Compared in Backoffice. Notes will be going up on the wiki - what needs to be changed so far. Feel this is a one-shot deal. Will test in full load.

11/11 - Katie: Susan, Michelle, Terri and Katie met on Thursday and went through the list. Have a couple of questions for EL. Will forward to Alon for review today. If he agrees to the changes, it should be done the week of Thanksgiving. Need to add the index terms for 1015 - Sue can do that. Add the digital collections at this point as well.

11/18 - Katie: Complete. Will need to test it.

302 856 Linking

Owner: Katie Sanders

6/16 - Katie: Working with EResources. Tracking issues in Redmine. 856 linking out to the incorrect campus or they're not actual resource links, but supplemental links. May also be working with Resource Management if it comes down to a cataloging issue.

6/30 - Katie: Put a call out to the EResources group to meet this week after they meet with EL.

7/7 - Katie: Meeting at 10 on Thursday with EResources and Resource Management to discuss.

7/14 - Katie: Discussed last week. Created a list of several questions to be discussed. EResources is going to come up with final recommendations for P2E. Main discussion point is the public display note and consistency across campuses. ER is also looking at proxy de-dup problems such as proxying free resources. ER is looking to clarify the E-location and E-government docs. RM is adding some more clean up jobs to their list and recommendation by campus including missing 856 indicators and blank 035.

7/21 - Katie: No updates from EResources. Waiting for next joint meeting - not yet scheduled. Katie want to meet with EL first.

7/29 - Katie: Waiting for EResources. Hopefully will have answers by the end of the week.

8/4 - Katie: Need to meet with Sue and Craig.

8/12 - Katie: Have a meeting on 8/20 with RM, ER, and Acq. Plan to discuss the details tab and the 856 linking.

8/19 - Will be discussed at the meeting tomorrow.

8/26 - Katie: Will set up a special meeeeting with ExL re: Gov Docs. Karen R. is taking the lead. ERM committee will review the test data to make sure things appear the way they should. Karen reported that links on the Voyager holding records are apparently the best way to get them in (vs the bib record). Thinking of copying some links to the holding record. Also recommended series of clean-up jobs the catalogers must do before migration.

9/9 - Katie: Still waiting for the ERM team.

9/16 - Katie: Will meet with the ERM team and discuss. Will check in with Craig.

9/23 - Katie: No meeting set yet. New issues have come up. Has to do with the 856 42 finding aids and supplemental material, teaching guides, and handouts. Will involve norm rule changes. Will need to get with Susan F. Will meet with everyone together.

9/30 - Katie: Discussing tomorrow.

10/7 - Katie: Met with ER last week. There are a few issues remaining. Can now test with renorm. Will test 85642 and see which parts of the rules need to be changed.

10/14 - Katie: Are able to test now. Need to touch base with ERM to make sure we aren't missing anything. Brian has a list of what needs to be changed. Will pass along to Susan, Michelle and Terri re: norm rules. They will need to meet with EL. Waiting for them to schedule.

10/21 - Katie: Waiting for Bryan's notes from archives and some final decisions from ER team. Plan to make a final decision by next week. Issues on current system are not being addressed for Alma Primo, so there are concerns. Emailed Mitch to update him on the issues. Trying to schedule a meeting with EL next week.

11/4 - Katie: Did not meet with EL. Will discuss this with Craig to see if he's ok with the recommendations.

11/1 - Katie: Trying to meet with Sunshine Carter (UM). Craig is setting up this meeting.

11/18 - Katie: Meeting this week with Orbis Cascade. Expect a resolution later this week.

11/25 - Katie: Waiting for the ER team. Should go through, need to coordinate with them.

12/3 - Katie: Will contact Jen and Susan to coordinate.

12/9 - Katie: Talked to Susan. Have ideas. Meeting on the 17th to finalize when Susan returns from vacation.

12/16 - Katie: Hope to resolve this on Wed.

12/23 - Katie: New norm rules should resolve this issue. Loading tonight. Will know on the 29th.

1/6 - Katie: Still testing, 42's are resolved. New issue with ebooks. Opened a ticket and will email Bryan to test the 42's.

1/12 - Katie: Bryan is supposed to retest. Will email him.

1/20 - Katie: Tested Friday. It is an issue. Emailed Susan and Karen. May be a cataloging issue with LaCrosse.

1/27 - Katie: Waiting to hear back from Susan, Michael and Karen. Need to rephrase the email. More complex than they thought.

2/3 - Katie: The cataloging issue is resolved. Susan F. would like to redo the norm rules one more time. Complete.

303 Renorm - Reindex

Owner: Katie

2/3 - Katie: Need to renorm one more time over Spring Break. Will follow up to schedule.

2/10 - Katie: Meeting with Sue F. on Thursday.

2/17 - Katie: Emailed contacts and archives group to review Primo. RM is also reviewing the RDA subject headings rule. Will regroup at the beginning of March to finalize changes.

2/24 - Katie: Will meet at beginning of March w/Susan.

3/3 - Katie: Will schedule a meeting w/Susan for later this week.

3/10 - Katie: Met and typed up notes. Susan needs to take some things back to RM. Next meeting 3/18.

3/17 - Katie: Meet tomorrow with EL. Will forward the renorm list to EL.

3/24 - Katie: Met last week. EL wants us to do some things. Susan is on vacation. Will meet w/Terri this week and put in place when Susan returns. Renorm is 4/3 in the early evening - will end on Tuesday. Let John know for usability testing.

4/7 - Katie: Wrapped up yesterday. One minor issue. Complete.

304 Details Tab - Display in Primo

Owner: Katie Sanders

6/16 - Katie: Working with Resource Management on this. She is scheduling a joint meeting. Either this week Wed or next week Wed at 2 pm. Working on this until the new Primo box is delivered and testing after delivery.

6/23 - Katie: Discussing this Wed with Resource Mgt. Planning to create guidelines in this meeting.

6/30 - Katie: Met last week with Resource Management. Decided that 590 should be changed to search and display, 599 should be search only, 69x should have search and display, and 99x entered into redmine - ongoing. Karen will ask the archivist if they want the 541 notes to display. 546 a&b will be changed to both display. Has opened a ticket forwarded to Michelle who had opened it initially (00085785 - will Alma and Primo display the holdings summary info) with EL and Bill re-opened a ticket (did not know the ticket #, local notes that display in the holding record.). Also tracking new issues in Redmine.

7/7 - Katie: Discussed last week. Need to find out from the catalogers what fields they use. Also asked EL for the default. No updates on the tickets from EL.

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7/14 - Katie: no new info.

7/21 - Katie: Put on hold. Bryan has moved to Stout. Waiting until he got settled to pick up the discussion. He is taking the lead.

7/29 - Katie: Will schedule a meeting with Susan and Craig later this week. Will rehash the details tab.

8/4 - Katie: Have not yet met with Susan and Craig. Will send out an email again this week.

8/12 - Katie: Have a meeting on 8/20 with RM, ER, and Acq. Plan to discuss the details tab and the 856 linking.

8/19 - Katie: Discussed last week. We're going to take the ExL default and add the 590 subfield 9 local field Susan recommended (RM). Will test this and will need to find some archivists to see what is missing from archives and digital collections.

8/26 - Katie: Joint meeting last week. Susan confirmed the 590 subfield 9 would be added by ExL. RM may also add 9xx. They will connect with ExL on that. ExL is in the process of setting it up on the box. Next step is testing.

9/9 - Katie: Primo box has arrived. Just beginning testing. Forming a sub committee for archives.

9/16 - Katie: Meeting with the archives team this week to get sample records. Will set up another meeting with the RM team.

9/23 - Katie: Reviewed last week in both meetings. Michelle updated a test record in the system to include alma fields and Brian will continue to work on the archives fields this week. Allison and Crystal have been testing and commenting. Next step is to get Susan F. involved. She will be redoing the norm rule.

9/30 - Katie: Found out that EL did not give us the default. They copied the Voyager setup instead by mistake. Will need to do some research and talk to RM tomorrow.

10/7 - Katie: Will double check this since renorm. May set up a new group to work with the details tab. Checking with Mitch.

10/14 - Katie: On Brian's agenda for Friday. Will follow up with Mitch about forming the group. Will meet ad hoc.

10/21 - Katie: Have the group. Waiting for info from the ER team. Need Bryan's notes from last week's meeting.

11/4 - Katie: Same as the renorm group. Met last week and is working this. Recommendations are done and will be discussed this week. Need to see completed Primo to test. Then send to EL for checking and then put in place the week of Thanksgiving then a week for re-indexing.

11/11 - Katie: Dependent on the meeting with Alon on Thursday.

11/18 - Katie: Met with Alon and Marina. Put the norms in place on Monday. Added the rest this morning and is republishing the data. Complete.

305 Browse Functionality

Owner: Katie Sanders

6/16 - Katie: Working with Resource Management. Want to set this up before go-live. Need to correct (full reload in Primo) after they send authorities out to a third party and authorities are returned corrected.

7/29 - Should be able to test on the fly at the beginning of Sept.

8/4 - Katie: Need to discuss with Susan. She clarified that authorities would come out of the community zone. Need to test with the new Primo box or possibly delay turning it on.

8/12 - Katie: Will add to the agenda on 8/20.

8/19 - Will be discussed at the meeting tomorrow.

8/26 - Katie: did not discuss at the meeting. Will wait and check the data when the box arrives and then discuss with Susan.

9/9 - Katie: will review next week. It is turned on in the test views. Secondary testing item.

9/16 - Katie: Need to test this. Will check in with Terri today. She is creating a document for Bruce.

9/23 - Katie: Turned on and included in the testing plan. Complete.

306 Revisit Government Docs

Owner: Katie Sanders

7/21 - Katie: Discuss at next cataloging ERM joint meeting. How to handle them so they are clean.

8/12 - Katie: Will discuss in the meeting on 8/20.

8/19 - Will be discussed at the meeting tomorrow.

8/26 - Katie: Karen R. is leading and scheduling a meeting with ExL.

9/9 - Katie: Waiting to hear back from Karen. Will email Craig.

9/16 - Katie: Will meet with ERM team. Contacting Craig.

9/23 - Katie: Will set up meeting with ERM.

9/30 - Katie: Discussing tomorrow. Karen R. has a solution, will find out tomorrow.

10/7 - Katie: Karen found out that the marchive load to the network zone will work for all of us. but, Madison needs to consult with the vendor on the contract. Complete.

307 Revisit Ebook Handling

Owner: Katie Sanders

7/21 - Katie: Next joint cataloging ERM meeting. Recommendation of how campuses handle the Ebook migration and for once we are live in Alma.

8/12 - Katie: Will revisit at the meeting on 8/20.

8/19 - Will be discussed at the meeting tomorrow.

8/26 - Katie: Took Karen's recommendation for Colleges. Any ebook collections Mad purchased for everyone - they are doing GDC to add SFX prefix to the 035 then that should notate to ExL not to export it. They are not including those links in the P2E. They will activate them in Alma either close to go-live or after. This may make Colleges a test case for the first extract. ERM is working this issue now.

Passing this over to Karen and Craig.

308 Revisit Location Names and Facets

Owner: Katie Sanders

7/21 - Katie: Re-evaluate the way campuses name their display locations in Primo and the way facets work to see if work needs to be redone. Terri is helping out with this. Has sent an email to see what campuses rely on to do in-depth limiting in Voyager. This will tell us what additional changes we need to make to the facets in Primo.

11/4 - Katie: No progress because we can't see everyone's Primo box yet.

11/11 - Katie: No change. Expecting by the end of this week.

11/18 - Katie: There are issues that can't be addressed until the re-indexing is complete. No date yet for the reindexing, but probably at least 3 days.

11/25 - Katie: No new progress. 2 issues with the facets: location names and resource type. Terri found a fix that another school used that might help with the resource type facets.

12/3 - Katie: Put in a ticket. There was corruption going on. The renorm for archives should clear up this issue.

12/9 - Katie: Meeting with Terri this afternoon. Hope to wrap this up and tie into the renorm over the holidays.

12/16 - Katie: Terri sent instructions to the campuses last week. Will remind reps today.

12/23 - Katie: Facets - got the last one sent in to Marina yesterday. Renorm should resolve this.

1/6 - Katie: Looks good. Waiting for feedback from MKE. Sue signed off on Madison. Will follow up with John.

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1/12 - Katie: Waiting for MKE to check. Will follow up with John.
1/27 - Katie: Complete.

309 Pick Up Location - Required Field

Owner: Katie Sanders

6/16 - Katie: Now, Voyager form does not force a pickup location. Currently a work-around that is difficult to use. 5-30 Jon from EL said that Alma would be able to fix this. Katie will open a new ticket with EL. This will impact Madison and Colleges. Due date is dependent on resolution prior to submission of the configuration form.
6/17 - Email from Katie: Here is the Case #00083696 which I opened for the ***CHOOSE PICKUP LOCATION issue with Exlibris. I will let you know when it gets resolved / answered.
6/23 - Received a reply to the ticket and forwarded to Curran, Karen, and Mitch. Svetlana replied. Did not answer the entire question. Does not guarantee that we will be able to do this in Primo. Next steps? Katie will re-open the ticket today and try again to get the answer to the original question.
6/30 - Katie: Forwarded to Mitch. Reopened the ticket. Svetlana replied again that it would be discussed in upcoming meetings. Case will be kept open until question is clarified.
7/7 - Katie: Svetlana is working this issue. No progress this week. Madison will need to include this info on their migration forms. Svetlana said to include it in the forms - hazy on how they would grab the info and work it in;
7/14 - Katie: No update. Case has not been updated. Have not heard from Mitch re: Svetlana's comments. They need to let him know what the process will be.
7/21 - Katie: No update. On agenda to talk to EL.
7/29 - Katie: Got clarification from Svetlana on Friday. Easy to set it up on the Primo end. Is a required field. Next step: test.
8/4 - Katie: Next step is to test it with Madison when the test data arrives and when Primo box arrives.
8/12 - Katie: No news. Copied what Madison put in their migration forms.
8/19 - Katie: No news. Will bring it up at the ExL meeting on Thurs.
8/26 - Katie: No news. Meeting did not take place. ExL is rescheduling.
9/9 - Katie: No news.
9/16 - Katie: No news. Will email Dineen, she is testing this the most. Only Mad and Colleges have this.
9/23 - Katie: Dineen has confirmed that it is fixed. Complete.

310 Item Status Revision in the RTA Box

Owner: Katie Sanders

6/16 - Katie: Minor customization - remove item status from display.
8/4 - Katie: Can't do this until the Primo box arrives. Need back office access.
8/19 - Katie: Delayed until the box arrives first week in Sept.
9/9 - Katie: Will review this week.
9/16 - Katie: Team reviewed this. There are issues, Mitch reported to ExL.
9/23 - Katie: Sue consulted with Karen, if functionality stays the same, then naming convention is fine. If EL can change functionality, may need to consider changing naming. Will discuss on Friday.
9/30 - Katie: Discussed with EL. They are proposing a solution that will make it easier for the user. Will not show the "more" feature and if not available at the home campus, will prompt the user to make a request. Marina will send the proposed screen shots and team will discuss. Next steps: look at labeling.
10/7 - Katie: will discuss at today's EL meeting.
10/14 - Katie: Did not get to this in the meetings last week. Working this via email. Put in a SF ticket for the labeling. No response yet.
10/21 - Katie: Have not heard from EL yet. A SF ticket is out there. Emailed Mitch about this.
11/4 - Katie: Adriana responded that they are working these tickets, but still no update.
11/11 - Katie: No change. Tickets are still open. Mentioned to Mitch last Thursday. Will put more pressure on EL after the remaining Primo boxes are delivered this week.
11/18 - Katie: Will discuss at this week's meeting. May give up on this. If so, there will be user confusion. This is about relabeling what shows up in the RTA box and what's there is not intuitive. Have created a wiki page about naming conventions - need campus contacts to weigh in. This may help some. Don't know yet if it is possible to edit the RTA box, but suspect it is possible.
11/25 - Katie: Needs to know if she can send the changes that are on the wiki through. Will email Mitch. If he OK's will send to EL and have them make the changes.
12/3 - Katie: Will be sending to EL later today.
12/9 - Katie: Put in a work order ticket. No response.
12/16 - Katie: Updated the work order. Marina gave instructions. Sue and Terri need to do this for us. Usability issue, not functionality.
12/23 - Katie: Working through the instructions. Will test after renorm.
1/6 - Katie: Requested from EL but they have not followed up. Asked them to change the wording. Will send them an email.
1/12 - Katie: Need to update this ticket.
1/20 - Katie: Reminding EL to move ahead with this.
1/27 - Katie: Need to reopen the ticket.
2/3 - Katie: Opened a new ticket - still waiting. RTA is failing - never updates.
2/10 - Katie: Will discuss with Sue. She reopened the ticket. They have it working at SP, but still need to apply it to the other campuses.
2/17 - Katie: 2 issues: relabeling (done at SP but not other campuses) and RTA is not responding in general. Have tickets.
2/24 - Katie: Will email Terri. Done at SP but not the rest.
3/3 - Katie: Will put in a new redmine ticket to get this done. Will poll campuses to see if they want this done.
3/10 - Katie: Waiting for campus responses. Will send another reminder to respond by Friday.
3/17 - Katie: Complete.

311 Alert CUWL User Services

Owner: Katie Sanders

7/14 - Katie: Notify to the committee to discuss the implications the third week of the semester and what kind of prep we need to do. Discussing this at the LAM meeting next week.
7/21 - Katie: Will wait until Mitch sets up the training committee. May not need to do this.
7/23 - Mitch: On the SC agenda for today.
7/29 - Katie: This will come from the new Training group. Complete for Discovery.

312 Build Archival Libraries into Separate Scope

Owner: Katie Sanders

11/18 - Katie: Submitted a list of all of the archival libraries that we want separated out into scope. Have input from Madison. This morning Marina put this in place for Madison, can only test it there because ArCat is not in the network zone. Discover team will test this week.
11/25 - Katie: Will show this to the archivists today. Alison will be there - she had objected to calling it archives. Hope to get clarification from her today.
12/3 - Katie: Svetlana only put WHS in the scope. Needs to be redone. Svetlana will follow up.
12/9 - Katie: EL thinks this is not done, but it looks done and correct on the server. Need to set up a meeting with them before the holidays to review new additions to the norm rules and correcting corrupted data. Katie will follow up with EL to confirm this is actually done.
12/16 - Katie: Sue will meet with Archives on Fri. Will try to get sign-off.
12/23 - Katie: Have sign off. Scopes aren't working as well as we would like because of dedup. Turning it off prior to tonight's renorm. Will see next week if this helps. May have to take the scope down to the location level and kick out the special collections if this doesn't work.
1/6 - Katie: Signed off. Complete.

313 Campuses Add Search Scope

Owner: Katie Sanders

11/18 - Katie: Need each campus contact to add the search scope. Need to create and distribute instructions and lend help if they need it.
11/25 - Katie: Haven't heard back from EL. They may be doing it for us. Will check with them next week. They are building the digital scope right now.
12/3 - Katie: EL should be doing this for all campuses except Colleges.
12/9 - Katie: Appears to be added to all campuses. Archivists want to relabel this scope. Will put in a ticket to have that relabeled. Then it will be complete.
12/16 - Katie: Superior does not have it. Work order put in.
12/23 - Katie: Do not have confirmation. Will follow up.
1/6 - Katie: Complete.

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315 Develop a Coordinating Testing Plan

Owner: Katie Sanders

- 7/14 - Katie: Reach out to each campus and find a list of records that we know have been a problem in the past in voyager. User these in testing when we get the new box.
- 7/21 - Met last Thursday. Started making notes of things that will need to be checked. Put out a call on Alma-I list - will be receiving something from another school that is migrating.
- 7/29 - Katie: within the next couple of weeks, we should have a document from EL. Will use that to develop a testing plan.
- 8/4 - Katie: Waiting for the Primo doc from EL. Will forward to Bruce when it arrives.
- 8/12 - Katie: Waiting for the form. Mitch is going to remind Adriana.
- 8/19 - Katie: Still waiting. Setting up a meeting this week Thursday at 10.
- 8/26 - Katie: Meeting did not happen. ExL is rescheduling.
- 9/9 - Katie: Will discuss this morning as a team. Will review what's on the box and get back to Bruce today. Met with EL.
- 9/16 - Katie: Terri is taking some of this up. She is creating a campus testing document. Will run it past Susan F. and Craig.
- 9/23 - Katie: Terri has a draft that has been circulated to the group. May have also sent it to Bruce's group. Should get an update on this this week.
- 9/30 - Katie: Reviewed Terri's plan. Gave her recommendations. She turned it in to Bruce. Complete.

316 Coordinated Testing w/Fulfillment

Owner: Katie Sanders

- 9/30 - Katie: Campuses are seeing different things in Primo - inconsistent results during initial test. Will coordinate to review and troubleshoot.
- 10/14 - Katie: Meeting w/ Dineen today.
- 10/21 - Katie: Technology issues caused delay. Will meet in person next week.
- 11/4 - Katie: Did not happen last week. Environments are out of sync.
- 11/11 - Katie: Waiting to meet with EL. Katie is scheduling. Dineen needs additional info from EL - wants a procedure of how RS should work.
- 11/18 - Katie: Bruce is working with the teams. Creating the spreadsheet for detailed testing.
- 11/25 - Katie: Have a testing plan. Waiting for feedback and confirmation from the teams, Bruce and Maureen and then will send it out to the campuses.
- 12/3 - Katie: Met with Ful. Launched RS sharing. Will touch base with Dineen next week to see if there is a need for more testing after Sunday's Alma update.
- 12/9 - Katie: Will schedule a meeting for Monday to recap testing and see what else needs to be done. Not all locations migrated. Need people to go through and verify.
- 12/16 - Katie: Only got 1 or 2 reports of failure rates. Will remind them today.
- 12/23 - Katie: Testing RS with Fulfillment. Sent email to Bruce for advice.
- 1/6 - Katie: Testing continues. Conversation continues with EL. Getting feedback from campuses.
- 1/12 - Katie: Need to know the new go-live date then will resume and retest.
- 1/20 - Katie: Will touch base with Dineen and Maureen. Terri and Sue will help with testing.
- 1/27 - Katie: First week of school, so no testing until next week. Dineen plans to send requests back and forth to test generally. Some requests are not showing up at all.
- 2/3 - Katie: Did more targeted testing. Found new issues with physical shipping.
- 2/10 - Katie: Testing continues. Looking at the delay in the Colleges requests. Updating spreadsheet every Fri.
- 2/17 - Katie: Testing continues on the delay issue. Will complete testing this week and then take this back to EL for a meeting.
- 2/24 - Katie: Testing continues. Primo next week.
- 3/3 - Katie: Continuing to test Primo this week. Will send out email today.
- 3/10 - Katie: Testing is complete. Dineen is testing other items this week, but this item is complete.

318 Activate PCI

Owner: Katie Sanders

- 8/26 - Katie: Asked them to go into the old PCI, export the database holdings, and use the excel spreadsheet as a reference and go into the new PCI and activate the titles on that spreadsheet.
- 9/9 - Katie: Changing this item to reflect all campuses (not just the test campuses). New dates defined today.
- 10/7 - Katie: Did not receive PCI for the other 11 campuses by last Friday. Will remind EL in he meeting this afternoon.
- 10/14 - Katie: Email went up. Will follow up with campuses.
- 11/11 - Katie: Everyone has activated. Test campuses have tested it and it is working. Giving the campuses a little more time to test.
- 11/18 - Katie: Existing issue has been corrected by Marina. Complete.

319 Primo Views - Other Campuses

Owner: Katie Sanders

- 8/26 - Katie: Checking the new box to make sure their customization and view changes carried over from the old Primo environment.
- 9/23 - Katie: Have not received this from EL. Will find out on Friday when this will be delivered.
- 9/30 - Katie: EL says we will not see our views until the Alma data is loaded. Will not be delivered until November. Changing dates.
- 11/4 - Katie: Can't see other campuses Primo env, yet. Should have all activated PCI.
- 11/11 - Katie: Checked the active ones. Test campuses are OK. Waiting for confirmation from campus contacts.
- 11/18 - Katie: Users should be testing views during functional testing. Hoping to hear from campuses this week. Will circulate a spreadsheet with a due date.
- 11/25 - Katie: Users are testing. Talked to Sue D. to do a small feedback spreadsheet to collect the needed details from the campuses.
- 12/3 - Katie: Waiting for the return of the testing forms.
- 12/9 - Katie: Still waiting on the return of the testing forms.
- 12/16 - Katie: Complete.

320 Verify Proxy

Owner: Mitch

- 11/11 - Katie: Need to test proxy. Mitch sent out a note to campuses to verify proxy IP and URLs. There was a problem at Platteville and a Redmine ticket. Waiting for Superior - others have answered. Sue Dentinger may know. Paula will ask her.
- 11/18 - Katie: All were submitted and applied. Issue with Colleges and Platteville. There is a ticket. Also a ticket from Madison that some things are not proxy enabled.
- 11/25 - Katie: Need to confirm with EL and test.
- 12/3 - Katie: Still a ticket open with Platteville. Will check to see if the ticket should be closed.
- 12/9 - Katie: Platteville is still open. Emailed them and have had no response. Will follow up.
- 12/16 - Katie: Has not heard back from Platteville. Will call John.
- 12/16 - Email from Katie: heard from Jon and this is complete.

321 Verify Digital Collection Pipe

Owner: Katie Sanders

- 8/26 - Katie: All campuses owning digital collection pipes need to verify extract and do extracting count to ensure it is working. (Madison, MKE, La Crosse, Parkside)
- 9/9 - Katie: They (EL) want to wait to hear back from us - verify that it is all there before they begin loading.
- 9/16 - Katie: Exit told us they did not want to set this up and move it over until we finish signing off on Alma issues.
- 9/23 - Katie: Waiting to set this up until Dec. Will check in with the Digital team and see how they feel about the postponement and will this leave enough time for testing.
- 12/3 - Katie: Looking good. Met with digital this week. Have a testing protocol. One campus has responded.
- 12/9 - Katie: People are responding. Just finished testing. Colleges results are a little odd. Will follow up with Digital next week.
- 12/16 - Katie: Will meet with Ann tomorrow. A few tweaks needed. Need to get rid of the get it tab.
- 12/23 - Katie: Looked better than most. Found some anomalies. Notes are on the wiki. Ann is following up with Peter G. Terri is following up with Jim (thumbnail images).
- 1/6 - Katie: Ann and Jim opened a case re: thumbnail images.
- 1/12 - Katie: Case has not been responded to yet.
- 1/20 - Katie: Still waiting for EL to respond.
- 1/27 - Katie: Marina successfully hid the requesting. Need Ann's team to look at it in Primo. Will contact her. Also, with the delay, may want to build the pipe for Pksd while it's still hidden.
- 2/3 - Katie: Looking good. Still doing some testing in all views. Contacts will provide Sue with test logins.
- 2/10 - Katie: One item outstanding. Primo is chopping off the url for things coming from UWM. Maybe content DM? Only doing it in Primo with Alma, not current prod Primo.
- 3/3 - Katie: Will email Ann and Jim L. to see if they have made progress on this ticket.
- 3/10 - Katie: No update. Forwarded to Mitch, he asked to hold off so the meeting wouldn't be derailed. Will forward to him again today.
- 3/17 - Katie: Talking with EL along with the renorm. Will try to reload MKE's pipe to see if it corrects the issue before the renorm.
- 3/24 - Katie: Sue emailed Jim to discuss. Have not heard back. EL told us that Sue could delete and reload on our own. Sue wants to schedule with MKE. Jim also needs to fix the views for MKE by the end of the week or it will set John behind. Will contact Jim again with a suggested date and ask for his approval.
- 4/7 - Katie: Checked late last week - put in a ticket. Content DM pipe is failing. No response from EL. Mitch is aware.
- 4/14 - Katie: Waiting for EL to confirm the update. Need feedback from EL. (Alon?) There is a ticket.
- 4/21 - Katie: Mitch escalated the ticket. Alon fixed the pipe. Did not resolve the URL issue. Alon suggested they republish content dm. Emailed MKE and have not had a response. Have time to work this until the 12th.
- 4/28 - Katie: Mitch followed up and so did Jim. Not a Primo issue. MKE will follow up with OCLC (support content TM) Not sure what to do with the ticket. EL is not a part of the solution, so closing the SF ticket and tracking in Redmine. MKE is taking control of the issue. Closing.

322 Customize New SFX Screens

Owner: Katie Sanders

- 8/26 - Katie: Each campus will need to apply customizations to the new SFX templates.
- 9/9 - Katie: This is a view edition in Primo. As team gets back office access will attempt to create instructions for campuses.
- 10/21 - Katie: John, Katie, and someone from Craig's team will work together. Waiting for delivery of Primo data, next week?
- 11/4 - Katie: Haven't got the Primo env yet.

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11/11 - Katie: This should be resolved this week. Will discuss in the meeting.
11/18 - Katie: Discussed and will create instructions and post to the wiki and send to campuses. Will also test the open URL piece of this.
11/25 - Katie: John is working this and working with UWM. No issues.
12/3 - Katie: Hoping next week to have the instructions for the campuses. Campuses may need assistance. Sue D. has offered to help.
21/9 - Katie: Have instructions. Waiting to hear back from MKE, Jim, who is testing.
12/16 - Katie: Terri's reviewing the instructions. John will work with Jen on the Iframe portion.
12/23 - Katie: First part of the instructions are on the wiki in the FAQ. Waiting for John's return.
1/6 - Katie: Haven't heard from John. Sue's fix should cover this.
1/12 - Katie: Waiting on EL. Ticket is open.
1/20 - Katie: Waiting for EL.
1/27 - Katie: Sue and John are looking into this. John has shared recommendations for editing.
2/3 - Katie: Need back office access.
2/10 - Katie: Have access. Will wrap up with week with Sue.
2/17 - Katie: Will work with Sue, Jen, and John this week to finalize.
2/24 - Katie: Tied in to Sue's issue because of the technical complexities. Jen provided her recommendations that will tie into label recommendations.
3/3 - Katie: Added Jens recommendations for those screens. Will wait until this week's update to send them out.
3/10 - Katie: Updating the KB again. Will send out a contact message reminding them this has been updated. Complete.

323 Permalinks to Primo

Owner: Katie Sanders

9/30 - Katie: Survey campuses about permalinks to Primo. Need to find out what permalinks exist out to Primo and how many links there are. EL proposed delivering a script to us that will help re-write them.
10/7 - Katie: Received about half of the needed campus reports. Will send a reminder today.
10/14 - Katie: Need to know who at Madison is working with libguides. MKE will likely have the most urls to forward to EL. Will forward what she has to EL today.
10/21 - Katie: Forwarded to Svetlana. Did not get them from Superior, RF, Pkside, Mad. Contacting them to follow up. Others have been forwarded to EL to start the mapping. RF will be coming this week. Need to contact Mad. Paula: suggested she start with Curran. There are no dependencies to this item.
11/4 - Katie: Had feedback from curran - uses Forward so this is not an issue. Complete.

324 Brown Bag Training on Primo Changes

Owner: Katie Sanders

10/21 - Hour long overview to the campuses on what has changed in Primo. Remote web session.
11/4 - Katie: In conversation with CUWL user services group to host this on 11/19 to 12/3.
11/1 - Katie: Added a 12/3 webinar to review Primo changes for staff users.
11/18 - Katie: Terri will be helping. On schedule.
11/25 - Katie: On schedule.
12/3 - Katie: Finished today.

326 Populate Alma KB

Owner: Katie

2/10 - Katie: Have posted some docs. Labels doc is coming.
2/17 - Katie: Working on instructional documents.
2/24 - Katie: have items to update. Need David to create a group when he returns from vacation. Primo Admins.
3/3 - Katie: David was waiting for Sue to create the new group. She is back and Dave is working this.
3/10 - Katie: Emailing Primo Admins for NetIDs.
3/17 - Katie: Primo admin group is all set. Have posted some docs.
4/29 - Katie: All is on the KB. Complete.

327 Post Testing Assessment - Resource Sharing & Eshelf

Owner: Tech Data, Fulfillment, Discovery

2/20 - Mitch & Bruce: When functionality testing is complete and all tasks identified as critical are identified and tested. Under the protocols, each team performs functional testing. Work with all FTCs to determine if there are any outstanding functional issues. Discuss the state of resource sharing and eshell with Discovery and Fulfillment. Deliverable: Risk analysis for Steering Committee including: what is resolved, what is not resolved, established workflows and workarounds. Establish go/no-go and/or strategy for isolated issues that are not ready but are not mission-critical to go-live. Dineen and Katie work with other FTCs to solicit input and then meet with Bruce. Bruce submits report to Mitch who takes it to Steering.
3/17 - Katie: Meet tomorrow with Mitch. Tracking on wiki and Redmine. Summarize the findings for Mitch and Dineen.
3/24 - Katie: EL has made corrections. Testing with Dineen. Contacted Bruce/Mitch asking what feedback they want. No reply. Suggested she send it to Maureen.
4/7 - Katie: Dineen and Katie signed off on RS. EShell is not good - Mitch is aware.

328 April: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

330 Protocol for Shutting Down UB in Primo

Owner: Katie

12/3 - Katie: Will meet with Sue this week and hash this out.
12/9 - Katie: Terri is writing up the protocols. All requesting needs to be shut off on Primo. Need to re-write.
12/16 - Katie: Instructions are ready. Working on the timeline.
12/23 - Katie: Sue is up to date and instructions are done. Waiting for cutover date confirmation.
1/6 - Katie: Complete.

331 Set Up an SFX Redirect for URL

Owner: Katie Sanders, Tech Data

7/14 - Katie: going to reach out to Tech Data to see if this is something they can do. When we transition to the new Alma URL, need a month's time when the users are taken to the new URLs.
7/21 - Katie: LIRA SIS team will do this.
12/3 - Katie: We don't have to do this now. Will leave SFX up until May 9. In the mean time the ER will contact the vendors and change the open URL link.

332 Voyager URL Redirect

Owner: Katie Sanders

7/1 - Katie: Brian Wilson will assist campuses and coordinate with DoIT hosting services to set up a redirect.
1/27 - Katie: Campuses are completing the redirect. Will check with Brian for status.
2/3 - Katie: Colleges is done. Will email Brian to see if follow up is necessary.
2/10 - Katie: Brian is back from vacation. Will contact him.
2/17 - Katie: Will talk about this at the LAMS meeting 3/2. Brian Wilson will be there.
2/24 - Katie: No change.
3/3 - Katie: Talked to Brian and Patty. Fulfillment will run a test next week. Should be finalized after that.
3/10 - Katie: Campuses that wanted this have it in place. Brian is setting up final forwarding for go live.
3/17 - Katie: Brian was on vacation. Will touch base. He thinks they will forward for free for a year.
3/24 - Katie: Have not heard back from Brian. He's been on vacation. Will ping him again.
4/7 - Katie: Brian is doing a writeup to see about getting us free forwarding for voyager urls. Should be ready by the 4/20 meeting.
4/14 - Katie: Brian should have this ready by next Monday.
4/21 - Katie: Brian confirmed this is set up. Needs to approve it with System legal.
4/28 - Katie: Have not heard from Brian. Will follow up this week.
5/12 - Katie: Need to email Brian for confirmation.
5/26 - Katie: Will talk to Brian today.

333 Cutover Notifications

Owner: Katie Sanders

7/14 - Katie: Need to develop a plan for notifying users of cutover interruptions to services.
12/3 - Katie: This week's meeting will discuss what steps need to be done in current Primo and what steps need to be done to shut UB down in Primo.

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12/9 - Katie: Wrote up protocol. Sue is working on the notice. Terri is working on the lams. Should have the plan ready to go by next week.
12/16 - Katie: Wrote up a timeline and shared with the lams and Dineen yesterday. Sue has the notice up on staging and is taking suggestions. Dineen is still working on her timing. Will share the timeline on Thur.
12/23 - Katie: Waiting for firm cutover deadline definition. Timeline is updated, but holding for now.
1/6 - Katie: forwarded paperwork to Mitch. Sue is having issues with fixes in production Primo. Hoping to resolve later today.
1/12 - Postponed until new go-live date is set. Sue and Steve got Primo in working order.
1/20 - Today will get the instructions for shutting down UB correctly.
1/27 - Katie: Patty F. will take this up and bring it to the next meeting. Will check with Brian W. to see what really needs to be shut off at go live.
2/3 - Katie: No change. Will email Patty.
2/10 - Katie: Will discuss at LAM meeting.
2/17 - Katie: 3/2 meeting - will discuss there. Patty is coming up with the shut-down procedures for that meeting.
3/3 - Katie: Sue will be putting putting up the Primo notifications. Prod on 3/15 then test functionality.
3/10 - Katie: After the Primo upgrade, Patty will do testing this Friday and have everything finalized for cutover procedures.
3/17 - Katie: Aaron caught an issue with offline testing. Will contact Fulfillment to see if the procedures can be finalized.
3/24 - Katie: Sue will update the banner notice this week. Waiting to hear back from Patty about the fulfillment procedures.
4/7 - Katie: Patti sent out the fulfillment procedures to LAMS. Sue posted the update banner and set up the forwarding to Iliad.
4/14 - Katie: All set.

334 Turn off UB in Current Primo

Owner: Sue D.

3/17 - Katie: Sue will apply the scripts to forward resource sharing to Iliad. Mitchell S. will activate the Iliad queue for UW items. Sue will post a notice at the top of Primo notifying users of the switch.
4/14 - Katie: this has been done. Some things are still getting through.

335 Post Notice on Primo with Alma

Owner: Sue D.

3/17 - Katie: At cutover, Alma won't be ready until noon. If EL switches the URL for Primo before Alma is ready we need to do something to Primo with Alma to block requesting until Alma is ready. Need to tell EL not to switch the URL prematurely. Sue can post a notice on Primo with Alma - system is switching today - may be slow, may be offline.
5/12 - Katie: Has not been done. Emailing Sue.
5/26 - Katie: Sue took care of this last week.

336 May: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.
5/12 - Katie: Reviewed.

337 Verify Primo

Owner: Discovery, Primo Steering, Tech Data

2/20 - Verify Primo with full clean data re-published and verify EShelf update if necessary. Can we start on the 18th? Mitch has the question pending with EL. Discovery Team works with campuses. Each campus must test - Campus Reps coordinating with their discovery staff. Testing window deadline time TBA.
5/26 - Katie: Verified. Tested. Heard from all but one campus and notified Mitch Tuesday night.

338 Coordinate Reload and Reindex of Data Remediation

Owner: Katie Sanders

11/18 - Katie: Coordinate with RM on the timing of reloading the records they've send out for data remediation.

339 Reloading Authorities

Owner: Discovery, Resource Management

7/14 - Katie: RM made a recommendation to send authority files to the 3rd party vendor. This is the coordination of the reloading after they come back.

342 Project Close Activities

Owner: Each Team

Goal: Work with Tech Data to conduct final system status review and identify and resolve existing mission-critical issues at all campuses.

343 Resource Sharing Clean-Up

Owner: Katie

5/26 - Katie: At Eluna, discovered there is a different possible configuration that would make RS more efficient. Need both Primo and Alma staging servers to set this up. Will involve Discovery and Fulfillment.

344 Archives - Call # and Barcode

Owner: Katie

5/26 - Katie: Call number issue may be helped by the RS solution in June/July. Also, archives needs to finish barcoding to use Alma fully. Also need them to abide by some standard. Need someone to talk to Matt Blessing about this.

345 Technical - Data Team

Team Members:

Bruce Barton, Chair (Head, Shared Development Group, Madison)
Karen Rattunde (E-Resources Cataloger/Coordinator, Madison)
Curren Riley (Library Systems Administrator, Madison)
Scott Prater (Shared Development Group, Madison)
Joe Tomich (Resource Discovery Team, Milwaukee)
Michele McNelly (Head, Technical Services, River Falls)
Susan Foran (Team Leader, Resource Discovery, Milwaukee)

346 De-duplication (Bib data) Analysis and Testing

Owner: Bruce Barton

6/18 - Mitch: Testing in preparation for the August test load.

347 Generation of Test Protocol

Owner: Bruce Barton

6/30 - Complete.

348 Generation of Test Sets

Owner: Bruce Barton

6/30 - Bruce: Complete.

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349 Testing & Error Reporting

Owner: Bruce Barton

6/30 - Bruce: Complete.

350 Meeting with the EL Migration Team

Owner: Bruce Barton

6/30 - Bruce: As yet unscheduled. Second round of testing will depend upon whether they reload the data. Every week, Mitch asks and EL postpones. Ex Libris has been meeting internally, but has not met with UW. In the mean time, we have done work organizing for the meeting. On the 25th we completed a set of meeting planning notes.

7/7 - Paula: Mitch has received 2 possible dates for this meeting: 7/9 or 7/14. He is polling to see which date works for everyone. Email from Mitch that the meeting will be Wednesday 7/9 at 9 am.

7/9 - Meeting took place.

7/14 - Bruce: Meeting resulted in a couple of tasks. **1. Perform analysis around suppressed vs unsuppressed records and the level of suppression. 2. Multiple match simulation. Both due the end of next week.** Adriana has promised a document in reponse to our list of issues. Bruce will email Adriana.

351 Supressed Records Analysis

Owner: Bruce Barton

7/14 - Bruce: Perform analysis around suppressed vs unsuppressed records and the level of suppression.

7/21 - Bruce: Underway. Expect to finish on time. Running the analysis from Voyager extract simulations. Will be adjusting the de-dup algorithm.

7/28 - Bruce: Not finished. Delay caused by: had to change the software that does the loading of data and he had to get a new machine to do it on - not enough power. Execution of software and data load complete, need to do the analysis, change de-dup logic, etc... No dependencies. Not needed until the extract is completed.

8/4 - Bruce: Has been running the simulation. Need to run the reporting bits - including this. Don't really need this until 8/20. Clean up should be going on now. change to Aquery allows us to query the current state of this situation, so the simulation is becoming less important.

8/18 - Bruce: Have run the simulations. Will do the reporting this week. Need to have in time for the delivery of the test data.

8/25 - Bruce: made a change in the approach. All records in the network zone will be unsuppressed. Complete.

352 Multiple Match Simulation

Owner: Bruce Barton

7/14 - Bruce: Multiple match simulation.

7/21 - Bruce: Underway. Expect to finish on time. Running the analysis from Voyager extract simulations. Will be adjusting the de-dup algorithm.

7/28 - Bruce: Not finished. Delay caused by: had to change the software that does the loading of data and he had to get a new machine to do it on - not enough power. Execution of software and data load complete, need to do the analysis, change de-dup logic, etc... No dependencies. Not needed until the extract is completed.

8/4 - Bruce: Complete. Worked correctly. Rate was very low - 4 out of 3 million.

353 Three Campus Test Load Extract

Owner: Bruce Barton

6/30 - Bruce: Depends upon EL completing the reload after the migration meeting.

7/7 - Bruce: Migration meeting is being scheduled. When do they plan to re-process the data. Dates will change after the meeting.

7/14 - Bruce: Depends upon if they will be reprocessing. Will not be doing this before the July extract, so the second round of testing will not be necessary. They will perform an entirely new extract. Renaming this task to 3 Campus Test Load Extract.

8/25 - Bruce: Test load has been delivered.

354 Bib Data Cleansing Planning

Owner: Bruce Barton

355 Pre -vs- Post Migration Analysis

Owner: Bruce Barton

6/18 - Bruce: Tasks: talk to Purdue to hear about their experience with this.

7/1 - Bruce: Complete. The RM team has a proposal to do the data cleansing after migration. TD team has no further tasks until post-migration. New action item will be made for this task.

356 Deliverable - Analysis

Owner: Bruce Barton

6/18 - Bruce: Coordinate with the Resource Management Team.

6/19 - Bruce: Will establish dates in next Tuesday's team meeting.

6/30 - Complete. Anticipated needing to do work, but it was unnecessary because it will be done post-migration.

357 Locally Enhanced MARC Records - Analysis & Planning

Owner: Bruce Barton

358 Create a Wiki Page to Collect Info

Owner: Joe Tomich

6/2 - Bruce reported complete.

359 Post Request for Registering Data Sets

Owner: Bruce Barton

6/2 - Bruce: Get all of the libraries to identify their collections of MARC records that they have enhanced and would want to have as bib records in the network zone. Respondents should be the catalogers.

6/18 - Bruce: Reported complete.

360 Receive Responses from Catalogers

Owner: Bruce Barton

6/2 - Bruce: Give catalogers 2 weeks to respond.

6/30 - Bruce: Survey is complete.

361 Tech Data Team Analyses of Responses

Owner: Bruce Barton

6/2 - Bruce: tech data team will perform an analysis of what there is and devise a plan to address cases.

6/30 - Bruce: Initial analysis is complete.

362 Estimate & Determine Number of Records to be Added to Madison

Owner: Bruce Barton

6/30 - Bruce: Due the 17th. Process the data from the survey to determine the rate of de-duplication that occurs in the datasets. Several schools proposed very similar datasets and we expect significant overlap.

7/7 - Bruce: Has not begun. Will work on it this week. Expect to complete on schedule.

7/14 - Bruce: Has not begun. May still finish on schedule.

7/21 - Bruce: Not completed. Expect to finish this week by Friday. Need to rerun the simulations and then do some queries.

7/28 - Bruce: Not completed. depends on de-dup simulation which has not been completed. Expect to complete this week. Need to know this for the prod load in January, but need to do this sooner for planning purposes. Changing due date to September.

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8/4 - Bruce: Karen has loaded MKE sample prior to the extract. Waiting for the extract.

8/18 - Bruce: Waiting for the extract.

8/25 - Bruce: Underway. Nothing new to add today. Will likely address this next week.

9/2 - Bruce: Nothing new to add. Did not get to it last week. Need to look at the proposed record sets from campuses and count them. Can do this in AQuery. Also need to understand which records need to be loaded and which ones don't. If it's unique in the system, it does not matter. If occluded by an upstream record, will need to load them into Madison. Expect the estimate to take a couple of hours.

9/8 - Bruce: Will be done this week.

9/15 - Bruce: Not complete. Not critical now. Does not need to be done until January. Changing date.

9/22 - Bruce: No new progress.

9/29 - Bruce: No new progress. Data will be loaded right before final extract. Have general, but not precise estimate until then. This will occur in January. Making a break in this action item - will pick it up after that load.

1/20 - Investigated and no records need to be added to Madison. Closing

363 Load Local Enhancements

Owner: Bruce

1/20 - Bruce: Recovering local enhancements to MARC records. Table of Contents enhancements at EC and LC and loading them into Alma.

364 Enhanced Record Proof of Concept

Owner: Bruce Barton

6/30 - Develop proof of concept demonstration of the technique of enhancing Madison records and adding bib records to Madison's catalog to demonstrate the enhanced record retention strategy.

7/7 - Bruce: Joe T from MKE has described a technique to be used. Have not begun implementing the technique. Will compare with an alternative outside of Voyager and drop the records back in as an in-place replacement. Better unit testing and less risk involved - will know what the record is before we drop it in.

7/14 - Bruce: Moving date from 7/31 to 7/25.

7/21 - Bruce: On track. What's left is relatively minor and will be done this week before the extracts. Need to identify a couple of test records where this comes into play (MKE) and then update the Madison record - 2 use cases: Madison has a record (copy enhancement to Mad); and Madison has no record (copy the bib part of the record from Mke to Mad to demonstrate that it will work).

7/28 - Bruce: complete on 7/24. Karen put in the records.

365 Non-Migrating Data Inventory & Planning

Owner: Bruce Barton

366 Create a Template & Inventory page

Owner: Bruce Barton

6/2 - Bruce: reported complete.

367 Identify Types of Non-Migrating Data

Owner: Bruce Barton, All functional chairs

6/2 - Bruce: Identify what the data are, requirements around the data.

6/18 - Bruce: Informed FTCs. Will follow up with a communication to all reps. Blog entry is posted. Soliciting responses through the summer.

6/30 - Bruce: Proposals have been submitted and discussion continues.

7/7 - Bruce: Added a couple of entries this past week. On schedule.

7/14 - Bruce: Ongoing.

7/21 - Bruce: Ongoing. No one has contributed anything to this. Some discussion last week about Superior who had a flood, they still have records for destroyed items and would like not to migrate those into Alma. Last week, looked at what the requirements will be around that, especially with respect to insurance claims. Other than Superior, campuses are encouraged to add entries to the list on the wiki. Bruce will send a reminder.

7/28 - Bruce: Ongoing.

8/4 - Bruce: Ongoing. Still collecting information. Will need to (by 8/31) look at this and begin process of identifying approaches as to what to do with this data. Hang on to Voyager data and keep it secure, but what is the accessibility plan?

8/18 - Bruce: Ongoing. Next step: begin to identify a group to look at what we have and probe more deeply on requirements.

8/25 - Bruce: Forming a group. Will start looking at requirements next week. Submissions due by this Friday. Have received some responses. Bruce reminded FTCs last week.

9/2 - Bruce: Haven't chanced at all from last week. Will be forming a group to determine requirements around these record sets. Complete.

368 Preserve Voyager Snapshot - Define Requirements

Owner: Bruce Barton

9/2 - Bruce: How to preserve the snapshot of Voyager at go-live. Should we archive this? For what period? Related to non-migrating because the questions are essentially the same. Form a group and have a plan in place by the end of October.

9/8 - Bruce: Did not discuss last week. Forming the group now. Put out an email last week to FTCs to recommend experts. Will remind them tomorrow and will have the group formed by the end of the week.

9/15 - Bruce: Have identified group members. Will convene a kick-off meeting this week.

9/22 - Bruce: Organizing a meeting later this week.

9/29 - Bruce: Group will meet Friday of this week. Was waiting for Steve Meyers to arrive.

10/6 - Bruce: Met last week. Discussed what it means to have a snapshot. Need to determine if there is a longer term need to preserve this data.

10/13 - Bruce: No update.

10/23 - Bruce: Will be discussed this week in the non-mig team meeting.

10/27 - Bruce: Have a proposal for preserving the snapshot. Exploring on-going costs.

11/3 - Bruce: Will be prepared by Friday.

11/10 - Bruce: Contacted the sysadmins and asked them for a recommendation and an estimate of cost. Expect this next week. Recommendation will happen a week from Friday.

11/17 - Bruce: Has part of the info back - costs from DoIT. Still need storage costs. Have asked for that. Then will have the cost of keeping Oracle working. All will be on one box, including Madison.

11/24 - Bruce: Brian and Kay are working this. Have the requirements. Determining storage costs. Have machine costs (\$5,999/annually plus other costs estimated total 10K/annually). Will contact Brian (on vacation this week).

12/1 - Bruce: No change. Bruce will work with Brian and Kay. Legacy will run through May. Most are read only except RF and EC. Need to understand when we will snapshot EC and RF.

12/8 - Bruce: No answer from them yet. Sent a note last week. Will send a reminder.

12/15 - Bruce: Still waiting for the costs.

12/22 - Bruce: No further word on the costs. Will send a reminder

1/5 - Bruce: Brian said he would run the Voyager instances in RO mode through May. Keep data running on Oracle. Do we need to do anything beyond that point? Estimate for consolidating into a single Oracle instance. Estimate for storage component. Need prod env until May for River Falls.

1/12 - Bruce: No update.

1/20 - Bruce: No more work until end of Feb and finish on 3/30.

3/3 - Bruce: Decide if we need to decide this now, or wait until after go-live. Get the quotes for what it takes to run a snapshot - storage costs. No decision will be made until June.

369 Business Analysis of NM Types

Owner: Bruce Barton

9/2 - What are the requirements for access to the NM data? May need to provide this data in a more convenient form than would be necessary for the Voyager snapshot.

9/8 - Bruce: Did not discuss last week. Forming the group now. Put out an email last week to FTCs to recommend experts. Will remind them tomorrow and will have the group formed by the end of the week.

9/15 - Bruce: Have identified group members. Will convene a kick-off meeting this week.

9/22 - Bruce: Organizing a meeting later this week.

9/29 - Bruce: Group will meet Friday of this week. Was waiting for Steve Meyers to arrive.

10/6 - Bruce: Assigned categories and tasks to group members and they have begun analysis. Will meet weekly.

10/13 - Bruce: Met last week with NM team. Worked through cases. Some do not need to be addressed or have been addressed. Others are outlined and are being worked by the team. Working this week.

10/23 - Bruce: Expectation is the team will complete the fleshing out of use cases and a sense of what the numbers are this week. Next week - look at what needs to be implemented and the approaches to retaining this data.

10/27 - Bruce: Complete. Team met last Friday and reviewed this. Requirements are defined and posted to the wiki.

370 Create Historical Fines App

Owner: Bruce Barton

10/27 - Bruce: Need to create a small app that makes it possible to query historical fines. Need to identify a resource to perform this work.

11/3 - Bruce: Need to allocate a resource for this.

11/10 - Bruce: Need by go-live. Will explore using an outside developer for this. Will flesh out the requirements this week with Aaron Dobson in MKE. Then will discuss with Andy to id a resource.

11/17 - Bruce: Meeting with week with Andy at DoIT Academic Tech, to discuss getting this going. Looking for them to do the devt. Will get an estimate.

11/24 - Bruce: Been in touch with Andy. Will meet this week with Chris Leland (team lead). He thinks he can work this in the timeframe. Need OK and costs from Chris. About 2 weeks labor.

12/1 - Bruce: Did not meet with Chris. Lunch with Andy on Friday. Will contact Chris early next week.

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12/8 - Bruce: Expect to begin this week. Will meet with the developer later this week. Expect this is about 2 weeks worth of work. Estimated \$6,000.
12/15 - Bruce: Scott and Bruce are meeting with the developer this afternoon. Eve is working on extracting data.
12/22 - Bruce: Gone to the developer who has started work.
1/5 - Bruce: DoIT is asking about a funding string. Meeting with Cate.
1/12 - Bruce: Go-live date has changed and it uncertain. Need a decision and then will see what the duration of Voyager is after that.
1/20 - Bruce: Largely completed. Deploying today. Next: acceptance testing.
1/27 - Scott: Deployed. Waiting until we get more developer time or how we are going to do acceptance testing. Talking with DoIT tomorrow about developer availability.
2/3 - Scott: On hold. Talking with developers. Getting them a list of things to do. Won't be deployed and provisioned with data until go live. Testing and trials prior.
2/10 - Scott: Have funding for outside developer. This week - coordinate loading Alma system data in test instance and id some testers. Will turn results over to the developer then do some styling.
2/17 - Scott: Second round of development. Doing data loads and then will have acceptance testing next week.
2/24 - Scott: Loaded data for 7 campus and worked out bugs in the extract. Waiting for acceptance testing. Bruce will send out to Aaron Dobbs.
3/3 - Scott: Waiting for acceptance testing - Aaron Dobbs at MKE. Expect by end of next week.
3/10 - Bruce: No update.
3/17 - Bruce: Getting Aaron set up to do the testing. Scott has opened access to include MKE.
3/24 - Bruce: Dineen is polling her troops about testing this. Appears to be working. A bit of follow up testing left.
3/31 - Bruce: Tested and id'd a couple of improvements. Relayed to the developer.
4/7 - Bruce out. No report.
4/21 - Bruce: Minor adjustments we will do ourselves. Testing is finished. Some historical notes were not caught. Fixing this. Otherwise tested OK. Scott: Patti F ID'd inconsistencies. Developer is looking into these today. Aaron Dobbs needs to look at this yet. Then, need to set up in a QA and prod environment.
4/28 - Bruce: No change. Scott: Need more notes data into the fines app. Working with Steve M. Also, WW was testing and finding errors. Steve is investigating.

371 Final Extract - Historical Fines Owner: Bruce

Final patrons/fines/bib data extracted and loaded in the historical fines database. Final data extract and deployment. Begin 5/17; end 5/20.

372 Patron provisioning Owner: Bruce Barton

374 Conduct Survey of Current Provisioning Practices Owner: Bruce Barton

6/2 - Bruce: Survey conducted 5/7-5/14. Results posted on 5/20.

375 Launch Follow-up Survey Owner: Scott Prater, Bruce Barton

6/2 - Bruce: Gather detailed information about patron provisioning. Survey in the field for one week.
6/18 - Bruce: Launched on the 16th. Complete.

376 Collect Survey Responses Owner: Bruce Barton

6/18 - Bruce: Survey is in the field.
6/30 - Bruce: Survey was to close last Friday. There are a couple of late returns. Bruce is monitoring.
7/7 - Bruce: Complete.

377 Perform Analysis of Survey Data Owner: Scott Prater, Bruce Barton

6/2 - Bruce: Bruce will find out where this data will be analyzed.
6/30 - Bruce: Starts today - but waiting for the late responses from the previous actio item. Added Jay D. and Jim L to the task working on a patron provisioning sub-group.
7/7 - Bruce: Committee will have first meeting this Wednesday.
7/14 - Bruce: Will complete this week. Met with the patron team last week and sorted out the tasks. Will be adding new tasks around this.
7/21 - Bruce: On track. Finding we need to go back to campuses and ask for more info.
7/28 - Bruce: 3 campuses have not responded. Jay and Scott are following up with them for additional information.
8/4 - Bruce: complete. Stout and Whitewater were the last and they were to report by the end of last week.

378 Meet with IIA Steering Committee Owner: Mitch Lundquist and Scott Prater

6/2 - Bruce: Requested access to attributes. No follow-up meeting scheduled.

379 Meet With Middleware Group Owner: Scott Prater, Bruce Barton, Mitch Lundquist

6/2 - Bruce: Discussed how to procede and solicited advice for the approach. Should post a request to the IAA Steering Committee (complete).

380 Coordinate with Fulfillment Team Owner: Bruce Barton

7/14 - Bruce: Depending on the survey findings, have the Fulfillment team see if there are common practices around patron processing that can be adopted across the system.
7/21 - Bruce: Met last Thursday with Dineen. Bruce sent a note to Mitch proposing we add Dineen to the Patron group to help expedite this work.
7/28 - Bruce: Dineen is now attending their meetings. Analysis will be passed to F/LL team this week for their evaluation.
8/4 - Bruce: Complete now that the method has been established.

381 Extend Special Use Privileges Owner: Bruce Barton

7/21 - Need an understanding of how to extend special privileges. Create use cases and submit via the alma-wi list and see what the EL advice is for the "Alma way" of doing this. How do we indicate the special rules and set them to apply automatically.
7/28 - Bruce: Expect this out by Thursday.
8/4 - Bruce: Have a list of use cases. We will schedule a meeting with EL to get clarification. Documentation is not very helpful. Jim L. will raise it at the next weekly EL meeting.
8/18 - Bruce: Need to check in with Jim.
8/25 - Bruce: Has not met with Jim. ExL meeting was cancelled last week. There is a meeting today. Bruce will write it up and post it to AlmaWI listserv.
9/2 - Bruce: No change from last week. Will post to AlmaWI this week.
9/8 - Bruce: No change from last week. Bruce will describe the issue fully to Ex Libris and solicit their feedback. He feels he is the person to communicate this to EL and it would not be helpful to add it to the Monday agenda.
9/15 - Bruce: No done yet. Will do this week. A couple of hours of work.
9/22 - Bruce: Complete. Defined use cases. Fewer than historically so. Have an approach for addressing this. They issue a special patron card for the exceptions and associate terms of use with that class of patron. Create internal patron, additional library card.

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382 Patron Data Migration

Owner: Ex Libris

7/17: Scott & Bruce: Patron data will be migrated as part of the three test campuses migration.
8/4: Bruce: Migration begins this week. Will examine/vet this in conjunction with Fulfillment.
8/25 - Bruce: Data went with the extract. Complete.

383 Deliver Population Attributes & Processing Schedule Info to DoIT Middleware

Owner: Bruce Barton

7/14 - Bruce: Requirements around patron processing.
8/4 - Bruce: Scott's goal is to have this out by next week. Scott is working this item.
8/18 - Bruce: Have a meeting scheduled with Middleware today at 4. Prep should be complete.

384 Gap Analysis & Implementation Planning

Owner: DoIT Middleware Delivery

7/14 - Bruce: Planning their implementation.
7/17 - Bruce and Scott: Asking Middleware for milestones.
8/18 - Bruce: Meeting with Middleware today.
8/25 - Bruce: Met with Middleware. Gap analysis is scheduled to be done at the beginning of September. Change end date. Data they are receiving from some campuses is spotty and may not be useable. Contingency: possibility that some campus data may be inadequate and we will have to work with that campus rather than through Middleware in order to get the data we need. We currently get extracts. We may need to use them to transform to produce a patron load file for Alma. Also: may be patron life-cycle issues re: to when they are exposed to this feed and when they are expired from it that will impact the load. Some patrons may not be in the Middleware feed. And, some who should have expired may still appear.
9/2 - Bruce: Will follow up this week with Middleware to learn what they've determined from the previous meeting discussion. Fulfillment team is looking at the life cycle issues this week.
10/6 - Bruce: Complete. Page on the wiki that ids the implementation plan.

385 UW Gap Analysis Follow-Up

Owner: Bruce Barton

8/25 - Take the Middleware gap analysis and determine what UW needs to do to mitigate the gaps and if the Middleware approach is a viable solution.
9/8 - Bruce: Scott looked at the data thats available. Still examining it. Preliminary look suggests that all needed items are present in the feed. Much richer than expected. Done follow-up work with Colleges to express which campus a person is affiliated with in the feed. Doesn't express it yet, but they are following up so they can.
9/15 - Bruce: Complete. Been in contact with MW and analyzed the data. Plan is in place. IAM Steering Committee is likely to ratify our request.

386 ILLiad - Campus Survey

Owner: Scott

1/12 - Scott: Survey - 4 questions - for campuses. How they do their ILLian patron processing. Purpose - to get the info we need to write a master program that will do their ILLiad processing for them post migration. Drafted the survey and vetted it. Contacted Madison to get the answers from Madison. Next step: draft an email to campuses and give the Madison responses as a template they can follow. This week.
1/20 - Scott: Underway. Will contact campuses. Due Friday.
1/27 - Scott: Most of the campuses have responded. Superior, SP, EC, and RF - Jay sent reminders yesterday.
2/3 - Scott: All surveys are in. Survey is complete.

388 ID Middleware Responsibilities

Owner: Bruce Barton

8/25 - Bruce: Middleware will deliver the data from their common UW System person-feed. Includes faculty, staff, students. Will not be altering the data beyond what it is. We must transform the data into the form it needs to be in to load patrons into Alma. This will involve the business logic of mapping patrons into groups and rules like when does a patron expire.

389 Map Current Patrons

Owner: Campus Reps, Middleware, Bruce Barton, Scott Prater

7/17: Item added by Scott and Bruce. Identify patrons that come in the update feed.
8/26 - Bruce: Verify that the current patrons have mapped correctly. Mapping happens during the migration. Working with the test campus data.
9/2 - Bruce: Checking is being done by Fulfillment Team. Do not have a status report today. Expect update this week.
9/8 - Bruce: No update from Dineen. Will follow up with her.
9/15 - Bruce: Complete. Clarified life cycle event language with Dineen. Proposal likely goes to the SC.

390 Implementation

Owner: DoIT Middleware

7/14 - Bruce: They need to find develop a common method for provisioning patron data to Alma for all campuses.

391 Obtain & Examine Campus Data

Owner:

7/17: Bruce and Scott: Get campus data into a form we can consume. Dates will be decided in upcoming Middleware meeting.
8/26 - Bruce: Dependent upon the gap analysis. One we know the data looks like it will work, we need to obtain samples. Dates not yet confirmed with Middleware.
9/2 - Bruce: Meet with Middleware tomorrow. Gap analysis will be completed then.
9/8 - Bruce: Preliminary feed is available. MW completed their gap analysis. Next steps: secure permission to do this and determine what we will get out of the feed.
9/15 - Bruce: Scott has been in contact with MW but has not yet received the data. Will be getting samples.
9/22 - Bruce: have created one part of the view. Scott's update indicates they are working on the other part of the data view.
9/29 - Bruce: We should see this tomorrow. Have additional views. Scott is working with them to define terms - establish common semantics.
10/6 - Bruce: Have obtained data and examination is happening this week. Steve is working on comparing the data.

392 Compare Extract w/ Current Voyager SIF

Owner: Bruce Barton

9/29 - Bruce: Will verify that the IAA patron feed matches patron populations in Voyager now.
10/6 - Bruce: Steve is doing this this week.
10/13 - Bruce: Underway. Have id'd variants. Investigating. Expect completion by the end of this week. Working with Middleware (Steve and Scott)
10/23 - Bruce: Still underway. Steve is working with this.
10/27 - Bruce - Ongoing. Close to finished with the Madison investigation (today or tomorrow). Will follow up with Dineen. MKE is next this week.
10/3 - Scott: Finished for madison, working with other campuses - MKE and RF - Steve M. is looking at them and will continue through Nov.
11/10 - Scott: Steve is in discussions with Colleges, RF and MKE analyzing their data. Progressing on schedule. Sent queries to GB and LC.
11/17 - Scott: Steve has been interacting with RF, LC, and GB. Waiting for campuses to respond. Also working on signoff for campuses - state of the extract - is this good enough for 2/9. Will follow up with the campuses who have not responded. (Voyager expert at each campus). RF - emeriti are not coming in. Reported this and had not received a response re: follow up. Scott will talk with Steve.
11/24 - Scott: LC is done. Steve has sent emails asking for sign-off on a couple of other campuses. RF issue - analysis looked ok, but second analysis revealed more. More investigation required. Colleges and GB in progress. MKE in progress. SP and Sup close to signoff.
12/1 - Scott: Steve is working this. Has picked up Osh and Sup and started work. Will start Pksd this week. Whit and Stout still need to be engaged. Still loading their data into the IAA. Expect completion 12/15.
12/8 - Scott: Have everyone's data in the IAA except for Stout. Helping them with tech difficulties. Following up on a Colleges issue. Following up today. Steve has sent out the numbers and requested sign-off from the campuses. Still waiting for responses. Steve is reminding them.
12/15 - Scott: Steve is still working on this. Waiting for the campuses to sign off. Campuses are discussing how they want to deal with populations that are very small. Not a priority for day one except MKE and their special students.
1/5 - Scott: No progress. Campuses are not responding. Colleges has responded. Need to draft a communication to remind.
1/12 - Scott: All but 3 campuses have signed off. Following up with them. MKE, RF, Stout.
1/20 - Scott: RF has signed off. End of week for the others. MKE has a special student population - Jim is looking to see if they can get into the IAA feed.
1/27 - Scott: Waiting for MKE. Will talk with Steve and Jim. May be extended for special student population.
2/3 - Scott: Complete. Talked with Jim. Holdup is on his end. The data is OK as it is for his purposes.

393 Create Patron Import Files from the IAA Feed

Owner: Scott

We create patron import files based on the IAA patron feed for all 14 campuses

7/17 - Bruce and Scott: Added item. Dates will be decided in upcoming Middleware meeting.
9/26 - Bruce: Organize the automated delivery of the data
10/6 - Bruce: Testing the import process. Continuing this week. Will form the core of the analysis of what we need to do to generate the files.

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10/13 - Bruce: Continuing testing.
10/23 - Bruce: Need Scott's input on Monday.
10/27 - Scott: Will begin this week.
11/3 - Scott: Beginning this week. Need to get business and logic in place for each campus - this complicates this action item.
11/10 - Scott: About 3/4 completed. Keeping completion date though it may be optimistic. The business project is what is left to be completed.
11/17 - Scott: Will finish this today. Need to put in the config for the remaining tables.
11/24 - Scott: Complete.

394 Implement Identifier Management

Owner: Bhaswati

10/13 - Bruce: Managing the primary identifiers for patrons and resolving identifier changes upstream.
10/23 - Bruce: work is underway. Will check in with Scott on Monday for update.
10/27 - Scott: In progress. Developer is creating an app that will take patron identifiers upstream and create or manage the persistent alma patron identifiers.
11/3 - Scott: Progressing. Need 2 more weeks. No complications - developing and testing the application.
11/10 - Scott: On schedule.
11/17 - Scott: Plans to have it ready to go by Wed. - end of week at the latest.
11/24 - Scott: Bhaswati was out last week. Also had an issue that required more handling. Should be ready beginning of next week.
12/1 - Scott: No change.
12/8 - Scott: Bhaswati is refactoring this. Scott will get it set up in a development environment this week.
12/15 - Scott: refactoring is done. Scott is still working.
12/22 - Bruce: Code is complete but not fully deployed.
1/5 - Scott: No progress. Next step, put up in prod.
1.12 - Scott: No progress. Will work on this this week.
1/20 - Scott: No progress. Will deploy this week.
1/27 - Scott: 75% deployed. Server is running with real data from Mad. Deploying the updater.
2/3 - Scott: 95% deployed. Working with reporting. Plan to have it automated by the end of the day.
2/10 - Scott: Complete. Up and running and updates are going.

395 Test Patron Import in Alma

Owner: Bruce Barton

9/29 - Bruce: Complete a test patron update in Alma.

11/17 - Scott: Talked with Josh and Matt last week. They will be running this. They need to create test patrons. On schedule. Should be done before the defined deadline. Bruce: there is the testing of the process and then the testing of the data we are generating in the process. Add a task for the Voyager SIF testing.

11/24 - Scott: Created and have reviewed with Josh and Matt. Created patron import file and opened EL ticket for them to load it. Waiting for EL. Will follow up today or tomorrow. Will need to run through the load 3-4 times.

12/1 - Scott: EL has loaded the data. Will look at the load and make sure the tests went OK. Should be finished this week.

12/8 - Scott: Did look at the load test. Found a couple of issues that need to be fixed and rerun. Dineen came up with other tests we want to do. Have started with another test load. Will do that today.

12/15 - Scott: Complete.

396 Voyager SIF to Alma External Load File Transformation

Owner: Evguenia Krylova

11/17 - Complete the transformation and test importing patrons from the Voyager SIF files. This is contingency planning for patron processing
11/24 - Scott: On track. Hoping to have a test file generated that we can upload into Madison and test.
12/1 - Scott: Will not be completed by the end of the week. Ev is working on the xml serialization.
12/8 - Scott: Will finish this week. Ev ran into a bug she needed to fix. Will set up in the dev environment this week. Need this ready for prod by 2/9. This is mission critical. Confident that this will happen on time.
12/15 - Scott: Still need to get it set up in the dev environment. Working on it.
12/22 - Bruce: Scott succeeded in getting it to run on a dev machine.
1/5 - Scott: Some issues with Alma detecting the file for loads. Able to generate a simple load file. Now testing the load. Alma has not been able to view and load the file we generate. Working with Dolph. Working on this today and this week. Want to get Madison working this week and then load other campuses. EL must load the files and this causes delays. Would like to be able to load the files ourselves. We do not have rights. Bruce and Curran may have rights. Will follow up on this offline.
1/12 - Scott: Had a successful load for Platteville. Waiting for them to verify the data. Now have a daily automated upload of Voyager SIF files. Next step: do the other campuses one by one and have them verify the data. If cutover is later, may not need to use the Voyager SIF.
1/20 - Scott: Did a comparison of test records w/voyager and alma. A few discrepancies. A few bugs. Put aside until Identifier management is set up.
1/27 - Scott: On hold while other items are being worked. Will resume next week.
2/3 - Scott: On hold while other items are being worked. Will resume next week.
3/3 - Scott: No progress. No risk to deadline.
3/24 - Scott: On hold. In good shape with the IAA data. Not ready for real time yet - but good be made ready. have a process in place. Would take 2 weeks of get this running. Unlikely to have a problem with the IAA data. Getting daily updates.

397 Develop & Test Patron Import Scripts

Owner: Bruce Barton

9/29 - Bruce: Automate and test the patron update processing.

12/1 - Scott: Do not have patron data yet. When Ev finishes her work we will have patron data. Probably end of next week.

12/15 - Scott: Ev is doing data analysis. Ev will be out over the holidays and Scott will pick up.

1/5 - Scott: Essentially in place. Still need to work to place output files in the correct place.

1/12 - Scott: Continuing to work this. The FTP sites are set up for Alma. Need data for testing. Data will come from IAA extract processing. This task will hold until that happens.

1/20 - Scott: Waiting for IAA extract.

1/27 - Scott: No change. Expect in one to two weeks.

2/3 - Scott: Waiting. Ev is working on this. Need to get her delta files. Ev is coming up with use cases for testing.

2/10 - Scott: Working this week. Ev has finished first draft of use cases. Need to get her the data to finish processing deletes. Review data with Ev and patron processing team. Develop a protocol for testing. Then put Ev's code into place and do acceptance testing.

2/17 - Scott: Ev finished use cases. Scott is writing up test protocol today. Will also get her the data for deletes today.

2/24 - Scott: Ev has the data for deletes. Running OK. Test protocol is written up and vetted. Ev is working on scripts.

3/3 - Scott: Ev has been out, but has made some progress on testing scripts. Process is up on devt. host. Doing test runs - trying to get it under 6 hours to run. Begin Madison testing next week.

3/10 - Scott: Work continues. Debugging.

3/17 - Scott: Complete. Able to get end to end run and load file successfully.

398 Verify Loaded Data w/Campuses

Owner: Scott

3/17 - Scott: Go campus by campus, verify the data, tweak where necessary.

3/24 - Scott: Finishing up by tomorrow the final piece of the testing. Communications with UWC to get their data. First test with UWC and Mad this week.

3/31 - Bruce: Working on testing. Found a small issue and retesting.

4/7 - Scott: Finishing UWC. Starting Mad. Notified other campuses.

4/21 - Scott: Sent notes to campuses for verification of processing. All responded. All on board. Now having them sample data test. Mad and Colleges are ready for prod. Hope to have the rest signed off next week. Then, verify data loads and finish up with incremental updates daily.

4/28 - Scott: Got data to all campuses and done internal verifications. Campuses are reviewing and responding. Concern about the lack of home addresses and phone numbers. May be a bug in our processing.

399 Implement Patron Reporting & Monitoring

Owner: Bruce Barton

9/29 - Bruce: Develop patron extract reporting and implement process monitoring.

12/1 - Scott: Do not have patron data yet. When Ev finishes her work we will have patron data. Probably end of next week. Needed Day 2.

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12/15 - Bruce: reporting around the processing. Scott: done a bit as part of the development process. Need to get set up and test.

1/5 - Scott: No progress. Voyager SIF piece - need to know day 1 that we are loading the right files in place - this requirement has been met - can report on this. Also, IAA to Alma loads - this is not yet ready. Partially implemented. Needs to correspond to full implementation of IAA (Day 2 or 3).

1/12 - Scott: Ongoing - setup, processing and testing. This is related to the 2 actions before this.

1/20 - Scott: One more week.

1/27 - Scott: Waiting - need 1-2 weeks.

2/3 - Scott: depend on task above.

2/10 - Scott: Can't start until testing starts.

2/24 - Scott: Waiting for testing of item above.

3/3 - Scott: Talking with Pete and Josh today about working on this. Also, need script from previous item.

3/10 - Scott: No change.

3/17 - Scott: Working this now. Counts of the data that is loaded - in place - adds, updates, deactivations. Also working to find out how we can export the results of patron data loads to a file system where we can have a program look at it. Monitoring manually so far. Want a way to automate that. Alma is not set up to do this.

3/18 - Scott: IM to Mitch - May be on the verge of a solution. Svetlana has replied.

3/24 - Scott: Get an email that is sent to UW - successful job or not - need more detailed data. Opened ticket with EL. Sent to development - ticket is in a holding state. Needs to be done before go-live. Mitch is following up with EL. Still developing based on the manual process.

3/31 - Bruce: No update.

4/7 - Scott: No update. Sent another email to EL. No automated way to get a report. Someone will have to check manually every day at every campus to see if they ran. case # 00139489

4/21 - Scott: EL replied and closed the case. On their map with no promised time of delivery. Escalated to Mitch. Without this someone will have to do this manually every day. Takes a couple of hours. Hoping by May, but possibly in one of the summer releases. Mitch talked with Adriana.

4/28 - Scott: Met with sys admins to discuss. Need to push this out to May. EL has made no commitment to automated reports.

400 Patron Processing Support Tools

Owner: Bruce Barton

9/29 - Bruce: Develop and test tools for debugging patron extract issues.

12/1 - Scott: Do not have patron data yet. When Ev finishes her work we will have patron data. Probably end of next week. Not needed until Day 2.

12/15 - Scott: This may become a post migration task.

2/17 - Scott: This week and next - writing utilities to help examine the data - will be come part of the suite of report tools.

3/3 - Scott: Have not created the tool for support purposes yet. Next step: wait until tests are going from scripts, then decide if we need a production support tool. Wait until after go-live to determine what problems are encountered and what is needed here.

401 New Authentication - Community Users

Owner: Bruce

12/22 - Mitch: Authentication for users without NetID. Old method is not secure enough. Need to develop a new login process and put instructions on the login screen.

1/5 - Mitch: For community users - internal Alma users. To avoid implementing the change at migration, retain current method and then implement the more secure method after Spring semester to correspond with the change in Iliad authentication.

402 Shibboleth Integration w/Alma

Owner: DoIT Middleware, Scott Prate

7/14 - Bruce: Authentication for Alma

8/26 - Bruce: Hearing from ExL they would like us to configure this for our users ahead of the Oct load so it's easier to grant people access by assigning roles. Meeting tomorrow afternoon.

10/6 - Bruce: Complete. It works for all 3 of the campuses.

403 Iliad - Implement Patron Processing

Owner: Scott

1/12 - Scott: To write a processing app and configure a processing env. to create Iliad patron import files for all campuses. Need at go-live. Bruce: have begun some of the implementation. Two related issues: Atlas - waiting for a quote from the UW system. 1. Changing how they do their merge logic; changing primary identifiers for at least 2 campuses that we know of.

1/20 - Scott: Work has begun. Ongoing. Has survey results for Madison and working on Iliad updates.

1/27 - Scott: Continuing. Has written code and need about 1-2 weeks to complete. Email from Scott: UW Superior has responded to the survey, but with incomplete information. Bhaswati will follow up with Laura Jacobs at Superior, to get in touch with central IT contact person there. All the campuses have replied to the survey, except for River Falls. Some campuses did not provide a sample Iliad load file. Bhaswati will follow up with them.

2/3 - Scott: On hold. Continue next week.

2/10 - Scott: Work has begun again. Continue into next week. Have funding for Atlas to change identifiers for 2 campuses. EC and WW. Need to schedule the change of identifiers. Also need to schedule the merge processing.

2/17 - Scott: Meeting today to discuss next steps and timeline. First, day one Alma to Iliad extract, next, username migrations for EC and WW, then modifying the merge logic to apply to System, not just Madison.

2/24 - Scott: Met and made a plan to approach this. Bruce is creating documentation. Creating a test file for Madison.

3/3 - Scott: Working on devising a detail plan for the patron processing that happens at go-live. Then contact the Atlas people and get this on their calendars - also WW and EC.

3/10 - Bruce: Met with Atlas. Agreed on a go-live plan. Target date of 3/23 to deploy a test environment for the changes. 5/20 - change how patrons are provisioned to Iliad from Alma. Need live patron data to do this.

3/17 - Bruce: Test server coming up on the 23rd. Prepping data for EC and WW. On track to be using their test server next week.

3/24 - Bruce: Expecting test server this week at Atlas. Data sets for testing are prepared. Emailed Atlas describing what to do. Contact at Atlas has moved on - have a new contact - Nate.

3/31 - Bruce: Atlas is still working on the test server. Expect to begin testing this week.

4/7 - Scott: Atlas is still working on the test server. Test load files have been created for several campuses. Will start loading as soon as the server is ready.

4/21 - Bruce: Iliad has delivered a test server. Testing this week.

4/28 - Bruce: Working on getting a test file for EC loaded. WW next.

5/26 - Scott Email: This week is all about full patron loads, verifying data, and setting up daily updates in production. We have one campus about to cross the finish line: UW River Falls (thanks, Maureen!). We'll be working on the other campuses starting today.

You can track our progress here: <https://wiki.doit.wisc.edu/confluence/display/UWVSLSP/Patron+Cutover+Plan+at+go-live>

In Bruce's absence, I'll also be working with Bhaswati, Katie Sanders to help move Iliad integration along. Bhaswati has that pretty well in hand. Still to do, once campuses are set up: document, document, document.

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404 Achieve Production Footing

Owner: Campus Reps, Middleware, Bruce Barton, Scott Prater

7/17: Item added by Scott and Bruce. Intend to have this in place prior to cutover.

405 Establish Chain of Contact

Owner: Campus Reps, Middleware, Bruce Barton, Scott Prater

7/17: Item added by Scott and Bruce.

12/1 - Bruce: Dependent upon other items that will not be ready until 12/15. Mitch: Need a clear communication with DoIT Middleware in advance of this. Don't need all processes documented by 2/9. One week past is OK.

4/7 - Scott: Need a chain of escalation. Mitch: will know more about governance one month from now. Moving this out.

406 Document Processes

Owner: Campus Reps, Middleware, Bruce Barton, Scott Prater

7/17: Item added by Scott and Bruce.

12/1 - Bruce: Dependent upon other items that will not be ready until 12/15. Mitch: Need a clear communication with DoIT Middleware in advance of this. Don't need all processes documented by 2/9. One week past is OK.

407 Support & Escalation Procedures

Owner: Campus Reps, Middleware, Bruce Barton, Scott Prater

7/17: Item added by Scott and Bruce. Make decisions and document support procedures.

12/1 - Bruce: Dependent upon other items that will not be ready until 12/15. Mitch: Need a clear communication with DoIT Middleware in advance of this. Don't need all processes documented by 2/9. One week past is OK.

408 Begin Daily Loading

Owner: Bruce Barton, Scott Prater

7/17: Item added by Bruce and Scott.

1/5 - Scott: Start loading the data before we switch to prod to shake out issues. We do not yet have data to load yet. Voyager SIF data - should start loading daily starting campus by campus. Expect by end of the first week in Feb. Bruce: Want to benchmark what the load times are. Need to demonstrate that the process works. Will prioritize campuses for those who are accustomed to having a daily load now first.

1/12 - Scott: Working on getting the daily load schedule for campuses to determine priority. Steve is working the Voyager patron mapping updates.

1/20 - Bruce: contingent on go-live. Scott: have the load schedule documented. Nearly everyone gets a daily load. Bruce: it's doing a patron update, so this is after go-live.

409 Final Reconciliation & Test Update

Owner: Bruce Barton, Scott Prater

7/17: Item added by Bruce and Scott.

410 Aquery

Owner: Scott Prater

411 Build & Deploy Test Instance

Owner: Scott Prater

6/2 - Bruce reported complete.

412 Build & Deploy Production Instance

Owner: Scott Prater

6/18 - Bruce: Reported complete.

413 Incorporation of ArCat Data

Owner: Jim Liedeka

6/30 - Bruce: Has not been installed. Will be installed this week. Had an issue and Scott was on vacation.

7/7 - Bruce: Completed yesterday.

414 Support of Aquery

Owner: Scott Prater

6/2 - Bruce: Must be supported through the end of January, 2015 (or when Ex Libris extracts data for the last time). Tool provides a convenient way for catalogers to easily query their data while doing clean-up projects.

6/30 - Bruce: No new activity.

7/7 - Bruce: Ongoing. Created a test to see if it was useful. Will establish a prod instance with more disciplined support and monitoring.

7/14 - Bruce: Ongoing. Nothing new.

7/21 - Bruce: did an update over the weekend.

7/28 - Bruce: no issues.

8/4 - Bruce: no issues.

8/18 - Bruce: no issues. There was a refresh on Saturday 8/16.

8/25 - Bruce: no issues. There is a general question about if this will be useful beyond the migration period. If so, what changes need to be made to accommodate the new structure in Alma. Question will go out to the RM team.

9/2 - Bruce: no issues.

9/8 - Bruce: refresh over the weekend. No issues. Decided to do updates on the weekends because the reindexing process takes too long. Did not want to have an outage during the testing period.

9/15 - Bruce: no issues.

9/22 - Bruce: had a broken index last week - resolved by end of week.

9/29 - Bruce: new load over the weekend. No issues.

10/6 - Bruce: nothing new.

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10/13 - Bruce: nothing new.
10/23 - Bruce Nothing new.
10/27 - Scott: Updated - fresh data from 10/23.
11/3 - Scott: Will be another extract this week. Will do some indexing.
11/10 - Scott: Did load and index yesterday. Batch extract questions from Joe T. in MKE that need to be addressed.
11/17 - Scott: Nothing new.
11/24 - Scott: Verified the numbers from the extract from the 23rd. Current as of then. Worked issues from batch jobs and cleaned up the database. Clean and ready.
12/1 - Scott: Nothing new.
12/8 - Scott: Ran an extract and loaded refresh from 12/2.
12/15 - Scott: nothing new.
1/5 - Scott: Loaded 12/30 in prod.
1/12 - Scott: Nothing new.
1/20 - Scott: Loaded fresh data from 1/13. Next: will do again in 2 weeks.
1/27 - Scott: Nothing new.
2/3 - Scott: Nothing new.
2/10 - Scott: Nothing new. No update this week.
2/17 - Scott: Updated with data from 2/10.
2/24 - Scott: Nothing new.
3/3 - Scott: Loaded data from 2/24.
3/10 - Scott: Nothing new.
3/17 - Scott: Posted new data for 3/11.
3/24 - Scott: Nothing new.
3/31 - Bruce: 3/24 update.
4/7 - Scott: No update.
4/21 - Scott: Did the load last week.
4/28 - Scott: Did the last load. Complete.

415 Expand Aquery Functionality

Owner: Bruce Barton

10/27 - Bruce: Extend Aquery to support item level data and circulation history. Development work needs to happen in the AQuery tool to display item level data. Will include circulation history in the item level data. Need to identify the staff resource to perform this work.
11/3 - Have not yet allocated resources for this.
11/10 - Bruce: Have not allocated resources. Not expecting this to be difficult or time consuming, but will wait until patron work is finished.
2/17 - Scott: Will need to be pushed again.

416 AQueryH - Historical Detail Circulation Capture

Owner: Bruce

Historical detail circulation captured and supporting reports developed. This is an item-level extension of AQuery. Development begins 3/15; ends 6/1.

3/17 - Bruce: nothing to report. Collections development reporting is not a day1 activity. Altering start date due to priorities.

417 AQueryH - Data Extract

Owner: Bruce

Extract data from Voyager and deploy to AQueryH. Can begin 6/1; end 6/30.

418 Network Environment & Systems Support

Owner: Technical Data Team

6/18 - Mitch: Work with Dolt and our systems teams (Jay Dougherty?); Systems function; Voyager extractions and support; Alma support. Later, systems monitoring, analysis of log data within Alma, monitoring of the environment.

6/18 - Bruce: May get Brian Wilson involved.

6/19 - Bruce: Will discuss at his team meeting next Tuesday (Mitch will be present) and define this action item further.

419 Support August Data Extracts

Owner: Jay Dougherty, Scott P.

6/30 - Bruce: Have a team - Jay D. and Scott P. They will work in August to support the August data extracts (create a new task). 8/1 - 31.

8/4 - Bruce: Have not had to provide support so far.

8/18 - Bruce: No update.

8/25 - Bruce: Complete. Was done by the system eng team.

420 Third Party Analysis

Owner: Jay Dougherty

Determine what needs to be done for each integration. What work is needed on the part of UW and/or third parties?

10/13 - Jay: After defining day1 integrations, this will be all across the board. Will create child action items after that step is complete.

10/23 - Jay: Answers the how question after testing has been assigned. Will be a workflow for a lot of these. Goes hand in hand with the testing. Analyzibg the workflow for each item-functionality. Also, determine what, if any, development work is required.

421 Survey

Owner: Jay Dougherty

9/29 - Bruce: Survey is in the field. Analysis begins next week.

11/3 - Jay: This was done 10/15

422 Provide API Assistance

Owner: Jay

11/17 - Jay: Working with other campuses for day 1 integration - Whitewater and Oshkosh.

11/24 - Jay: Sent out email to those planning to use the API asking (Whitewater, Oshkosh) for questions and discussing Madison's plan. Have not received a response.

12/1 - Jay: Received response from Osh, not WW. Assuming API is going well. Will ask again in 2 weeks. WW needs it for patron integration w/D2L. Osh needs it for Info Literacy. Osh has 2 developers that use API all the time, not concered about them. WW says they have someone to do the work. Jay does not know this individual. Gave her the info about how to get access.

12/15 - Jay: Sent another email to Whitewater and Oshkosh. Osh replied and has started on the test env. Will follow up with Whitewater.

12/19 - Jay email: Contacted Oshkosh and Whitewater. Maccabee at Oshkosh let me know that he has given has developer and Craig Thomas access to the developers network to look into this. Patty from Whitewater said that she thought their her local developer was working on this, but didn't have details.

1/5 - Bruce: No new info.

1/12 - Jay: Heard from Patty - developer was working on API. Have not heard from Oshkosh. Will follow up.

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1/20 - Jay: Closing. Hardly any responses. No issues reported.

423 Third Party Integrations

There are a number of integrations that occur: extracts to deliver data to a third party system, delivery of data to systems like RapidLL. Some of these need to be in place at go-live. Others are periodically delivered to a vendor/consumer. May not be needed by go-live. Need to triage and determine which are which. Then need to analyze requirements. Last, identify discreet projects to implement the integrations.

424 Form a Team

Owner: Bruce Barton

8/25 - Bruce will form a team over the next two weeks. Identify likely candidates and vet with Mitch and possibly SC.

9/2 - Bruce: Have Jay as chair. Does not know if anyone else has been added to the team. Meeting this afternoon.

9/8 - Bruce: Waiting for feedback from the FTCs. Will form the team by the end of this week.

9/15 - Bruce: Have formed the team.

425 Triage the Work - Prioritization

Owner: Bruce Barton

Determine what has to be live on day 1 and what can wait. Identify the delivery constraints.

9/15 - Bruce: New team will meet this week.

9/22 - Bruce: Met last Thurs. Jay D. is chair. Have begun triage exercise. Charter for the group on the wiki. Chaning end date to 10/15.

9/29 - Bruce: Jay queried campus contacts. Team met last week. Next step, analyze responses. Jay is out this week so Bruce will fill in. Asking about 3rd party integrations and were there additional integrations not on the EL list. Additional integrations are being reported. As new integrations are identified, will triage them. Also need to help the campuses what the requirements will be and determine what has to be done now (required, current) or what can wait.

10/6 - Bruce: Jay has gathered data from campuses. Need to ID those items which are day 1, needed later, nice to have.

10/13 - Jay: Campuses have been queried. Created master inventory list. Vetting with the team today. Will send out to reps after. Hope to finalize by Thursday. Next Step: identify day 1 integrations. Hope to have them identified by the 23rd.

10/23 - Jay: Have identified group 1 day 1 and other groups. Working on EPI related items.Complete.

426 Identify Resources

Owner: Jay

Identify resources to complete the work.

10/23 - Jay: crated a wiki inventory, ranked everything into phases - ex: day one, etc... Now working on a testing plan for group 1, day 1. Complete.

427 Develop Testing Plan

Owner: Jay

10/23 - Jay: Will go over group 1 day 1 items and contact the teams who will be testing and assign tasks, or assign tech/data staff to test items. Teams may already be testing some items.

10/27 - Bruce: No new update. Jay at workshop today. Will update next week.

11/3 - Jay: Need to talk to the chairs, Acq, RM and ER, to talk more about what they expect of us in terms of testing. What are they testing, what do they need help with, what does TD need to test.

11/10 - Jay: There is an issue. Emailed the teams twice last week but have had no response. Paula and Mitch will follow up with them to have them call Jay. Want to have this finished this week and report next Monday.

11/17 - Jay: Complete. Heard back from everyone, have a good idea of what needs to be tested and it's less than originally thought. Part of normal workflows.

428 Z39.50 integration

Owner: Joe Tomich

11/24 - Jay: Joe is working this. Issue with config that he hasn't gotten to yet - waiting for another piece. Jay is staying in touch. Bruce: additional email: Joe has what he needs and is working this.

12/1 - Jay: no progress. Will meet this week w/ Joe.

12/15 - Jay: Complete. Functionality has been tested. Will likely have enhancement requests, but it works.

429 SpineOMatic

Owner: Jay

11/18 - Spine label printer developed for Alma.

11/24 - Jay: Will look at the doc this week and try to install either tomorrow or early next week.

12/1 - Jay: Mad has tested this. Need modifications - sort out how to configure the printer. RF has tested and it is working.

Still need to test at Pksd. Jay thinks all campuses will need to use this.

12/15 - Jay: Complete. Tested and it works.

430 SIP (La Crosse)

Owner: Jen Holman

11/18 - For La Crosse for iPad checkout machine

11/24 - Jay: Used at LC and Mad. LC - Kate sent an email about getting config for the SPF. Told her to enter a ticket into Redmine. It is assigned to Bruce and under functional review. Bruce: need to sort out with the vendor how to test this while live.

12/1 - Jay: no progress. Will meet this week w/ Joe. Ticket in SF. Still under functional review and assigned to Bruce.

12/15 - Jay: Will need an FTP server for a number of third party integrations including SIP. LaC is testing. Sent them documentation.

12/19 - Jay email: I contacted LaCrosse about this, and they are working with their vendor to get the self-check machine configured for testing. This includes installing the needed Stunnel software.

122 - Bruce: next step configuring and testing

1/5 - Bruce: no new info.

1/12 - Jay: Heard back from LC last week. Moving ahead. Vendor is helping to install software needed for integration. Asked for info on Madison's SFTP server and it was sent.

1/20 - Jay: Talked to LC. Working with vendors for their self check machine. Need software installed by vendor. Making progress.

1/27 - Jay: Talked to LC. Vendor is installing the software now. Slow progress.

2/3 - Jay: No news from LC. Will send an email.

2/10 - Jay: Talked to LC. Vendor is testing integration w/Alma. More in a week - results.

2/17 - Jay: LC is further along with the testing. No issues.

2/24 - Jay: Testing is ongoing.

3/3 - Jay: Testing is ongoing. Will contact them for update. Will step in to see if there is an issue with the vendor.

3/10 - Jay: LC worked with the vendor last week. Able to get a response back for the SIP connection for Alma. Next week will try to hook up the iPad kiosk during spring break. If that works, this is complete.

3/17 - Jay: Test cutover this week - their spring break. Not confirmed.

3/24 - Jay: Have not had a reply from them. Will call today or tomorrow.

3/31 - Jay: They are testing this week and next.

4/7 - Jay: Doing final cutover testing today. Will know soon. Expecting it to work

4/21 - Jay: Complete and working.

431 FTP Server

Owner: Jay

12/15 - Will be needed for SIP and other third party integrations.

12/19 - Jay email: I was contacted by Melissa at GB who is anxious to use the FTP server for Bursar. I contacted Scott and Curran, and Scott is going to try to give me an update on its creation.

1/5 - Scott: Keith finished setting up the FTP server last Tues. Scott needs to verify that he can log in. Need to communicate that it's set up and ready to be configured in Alma. Will draft an email to Jay with instructions about how to do it.

1/12 - Jay: Has been created. Scott:sysadmin is working issues with logins. will review and test this morning and update the documentation. Should be ready to communicate by the end of the day.

1/20 - Jay: Complete. Set up and working. Getting credentials out to campuses. Addressing issue with Superior.

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432 RapidILL (Madison)

Owner: Scott

11/24 - Jay: Madison will need to comment on this. Will be assigned to key people at Madison. Bruce: have not begun this yet. Scott: contacted EL a couple of months ago. There was an exchange with Marina. Scott will follow up with Marina.
12/1 - Scott: Followed up with Marina. They have enabled a publishing profile for this that is in place and ready for us to review. Only exports MARC XML. Not anticipating a problem, but need to test. Marina will demo and discuss with interested parties this week. Only Mad and MIKE use this. Scott will follow up with Heather and Beth and Curran and schedule a meeting.
12/8 - Scott: Meeting scheduled with Marina and RapidILL people from MIKE on 12/11. Marina will review the Alma publishing profile. Will want to do a test run and upload to Rapid.
12/15 - Scott: Met with Curran and some of the ILL staff. Marina showed how the publishing profiles work using the Alma tool. Need to sit down with tech services and review what they showed and generate a test file and upload to rapidILL. Can be done post migration. Any profile we set up right now will be blown away. Test after migration.

433 Uborrow (Madison)

Owner: Bruce

11/24 - Bruce: Subset of Z39.50. Will need to have them change the end point at which they (the vendor that supports this) are switching from Voyager from Alma.
12/1 - Bruce: Will meet with Heather next Monday to review known requirements.
12/8 - Bruce: Meet with Heather today. Z39.50 is up and running, has been configured. Need to work out logistics with Uborrow.
12/15 - Bruce: Met with Heather and Curran. Ready to go. Functionality is there. Need to give them a new address at cutover.
12/22 - Bruce: no change. need to coordinate the cutover next.
1/5 - Bruce: no change.
1/12 - Bruce: no change. only task is to coordinate with the vendor to provide them with the new z39.50 address at cutover.
1/20 - Bruce: No change.
2/10 - Bruce: No change.
4/28 - Bruce: Need to coordinate to begin using Alma Z39.50 endpoint.

434 Library Course Pages (Madison)

Owner: Bruce and Evguenia

11/24 - Bruce: Work has begun. Related to our Forward implementation - code that is used in this to access Alma is the same code. Testing will be necessary in December.
12/1 - Bruce: Ev is working this. (Alma APIs). Mitch: Be able to link to Alma bib records from library course pages. Bruce: built out the functionality for the Forward catalog.
12/8 - Bruce: Ev continues to work this.
12/15 - Bruce: Ev has finished and given her work to David.
12/22 - Bruce: No change.
1/5 - Bruce: will get a status from Ev.
1/12 - Bruce: Complete.

435 Generation Fifth LAS (Madison)

Owner: LTG (Curran and Josh)

11/24 - Bruce: Know the answer to this. Have a meeting coming up 12/8. Should be ready before 2/9. Testing during the month of December. Bruce will follow up with Curran for an update.
12/1 - Bruce: Meeting next Mon with Heather.
12/8 - Bruce: Meet today to review what needs to be done.
12/15 - Bruce: Met last week. Setting up infrastructure now to do the testing. Configuring Alma to do the testing. Waiting for LTG to set up the environment in Alma.
12/22 - Bruce: Met last week. Will check in with Josh to find out how testing went.
1/5 - Bruce: Call with EL today. Scott: Has been set up and seems to be partially working.
1/12 - Bruce: Doing testing. Scott: Josh is working with LAS now that the Alma part is working. LAS is testing. Believe they have a successful end to end run.
1/20 - Scott: Talked with Josh. Waiting for the vendor LAS to set up the pieces to process the file.
1/27 - Scott: Josh said LAS is still working on processing the file. They are working with EL.
2/3 - Scott: No news. Waiting for the vendor.
2/10 - Scott: Talked with Josh and the vendor. They are done and waiting for us to test. This week we will test end to end integration w/Alma.
2/17 - Scott: Complete.

436 Bursar Functionality to PeopleSoft

Owner: Jay

2/3 - Jay: export financial data in Alma - rectifies the fines. GB is far into this and can export the file directly from Alma. Programmer is looking into how to get this into PeopleSoft.

437 Bowkers Books (Stevens Point)

Owner: Jay

2/3 - Jay: SP is looking into this. Exporting an Excel file from Alma and transferred somehow into the service.

438 Hathi Trust Exports (Madison)

Owner: Bruce

2/17 - Scott: Alma has a complex tool for writing bibliographic data via the interface. Need to set up the integration profile (catalogers) then, after export, do a transfer into Hathi to test.

439 CIC Shared Print Repository

Owner: Bruce

2/17 - Bruce: Serials print repository. Send to the CIC what our holdings are so they know who they can release copies to. Bibliography inventory report. Catalogers will create an integration profile, we'll export the data to CIC and test.

440 ECIP Pre Publication Records

Owner: Bruce

2/17 - Bruce: Send to the ECIP data. Bibliography inventory report. Catalogers will create an integration profile, we'll export the data to CIC and test. How timely does this need to be in order to meet publication schedules?

441 Fine Payment Web App

Owner: Bruce

2/17 - Scott: Integration where people can pay their fines. Must integrate with campus credit card service.

442 Report to Reconcile Vendor Data

Owner: Bruce

Report to reconcile Voyage and Alma vendor data. We have old vendor data - can it be reloaded.

- Develop reports in March-4/10.
- Run reports one week before tech services freeze and data extraction (4/16).
- Tech services fixes data as needed in Voyager/Alma through 4/23.

3/3 - Bruce: Starting today. Investigate how to access the vendor data in these systems.

3/10 - Bruce: Investigating how to get vendor data out of Alma and Voyager.

3/17 - Bruce: Investigation is not encouraging. Cannot see a method in Alma for extracting the vendor data in a useful form. Vendors do not appear in analytics at all or in Alma APIs. Inclination: try to detect changes in voyager by looking at update stamps in records. One time event. Verify that we have not drifted between the two systems.

3/24 - Bruce: Can we detect and report on updates? Find out and address any gaps. Is there a query we can run? Maureen will produce the access query.

3/31 - Bruce: Maureen provided a simple query. Need to verify multi-valued tables - may need another query.

4/7 - Bruce out.

4/21 - Bruce: Only option is the simple query. This has been done and will be the solution.

443 Shelflister

Owner: Jay

3/3 - Jay: Add on app that gives a list of items on a shelf. Gathered some campus information. Investigate potential solutions to this. Need to ask what people in the Alma community are doing for this. Emailed Alma-L to see if there is anything out there. Also checked developer's network. Waiting for feedback.

445 Install latest Auto-extract package

Complete.

446 Deliver migration forms for all institutions and ERM data

Complete.

447 Define Scope of Data Testing for Testers

Owner: Testing Team - Maureen

10/13 - Bruce: Define and communicate scope to campus reps. Estimate that data testing will last 2 weeks - first 2 weeks of November.

1. Gross measures testing - in progress at some campuses

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2. Network Zone testing - Karen R
3. ID the representative data sets - select records. Terri: this should be done now - Bruce: by the end of this week. Reps will use these data sets to examine the data.
Will communicate this at tomorrow's All Reps meeting.
10/23 - Bruce: complete.

448 Document and communicate protocols

Owner: Testing Team - Maureen

10/13 - Bruce: Have communicated the Voyager side of some of the gross measures. Alma side needs to be communicated. Will be executed at the beginning of Nov. Need to point people to the representative data set. Terri: There has been communication of SFX for eResources. Most of the work has been done by the functional teams. RM side is very detailed. Some things out on Discovery, Mitch: where should this information live? Terri: point from the testing wiki page. Bruce: next steps - check on documentation and communication status of the Alma side; Do the work to pull things together on the testing page; create and communicate process for communicating testing responses (Redmine).
Bruce: final review of the protocols with the campus reps at the workshop.
10/23 - Bruce: Some fine tuning (ER group) but otherwise complete. Followup with Curran: account creation - preparing Madison's roles document. Will talk with campus reps next week in MKE. Need to communicate with contacts about setting up accounts for functional team leads at each campus. Bruce will follow up today and post a note to contacts. Complete.

449 Prioritize testing deliverables and identify responsible participants

Owner: Testing Team - Maureen

10/13 - Bruce: Still to be decided. Can we finish by Mid-Nov? Mitch: also, can we control access to the environment during that period of time? Bruce: ID of responsible participants is under way. Prioritization: makes sense to get the gross measures work done early on. This will point out "data missing" or other big problems. Should set a deadline for this. Primo - need to set intermediate dates to keep them from waiting until the last minute.
10/23 - Bruce: Complete.

450 Establish and distribute firm testing timeline

Owner: Testing Team - Maureen

10/3 - Bruce: Beginning this now. Will complete this week. Will discuss w/testing team how to document the dates for posting.
10/23 - Bruce: Complete.

451 Test Load Delivered

Owner: Bruce Barton

10/24 - Email from Mitch: I spoke with Adriana this morning and our 14-campus load data will not be available until next week. They're currently looking at the following schedule:

Prior to Monday (most likely Monday morning) they will deliver our Network zone along with River Falls, Milwaukee and Madison data
Monday we should expect Whitewater and Oshkosh IZs
Tuesday is Superior and Eau Claire
Wednesday is LaCrosse and Green Bay
Thursday is Colleges, Parkside, Platteville, Stevens Point, Stout

She characterized these estimates as conservative and there's a chance that the IZs will be delivered earlier. We'll see.

10/27 - Email from Svetlana indicating River Falls and MKE had been delivered.

10/28 - Email from Svetlana indicating Oshkosh and Whitewater had been delivered.

10/29 - Email from Svetlana indicating Madison had been delivered.

10/31 - Email from Svetlana indicating Eau Claire and Stevens Point had been delivered.

10/31 - Email from Svetlana indicating Superior and LaCrosse had been delivered.

11/1 - Email from Svetlana indicating Stout, Colleges, Green Bay, Parkside, and Platteville had been delivered.

11/3 - Maureen: Testing will begin this week. Maureen will send out a notice that everything has been delivered.

452 Test Load Data Review

Owner: Maureen

11/10 - Maureen: no one has uploaded their spreadsheets. People are looking at it, but unsure of completion status. Have sent out a reminder that this should be done by Friday. Have skimmed the reported issues - most are functionality, some are migration issues, but nothing major. Some cases are reported to EL immediately, others report additional campus input first.

11/17 - Maureen: Only 3 campuses: EC, Stout, Superior, have not posted and OK'd. Everyone else has posted their spreadsheets. Will contact the 3 campuses for their OK. Will update the campuses at the All Reps meeting tomorrow.

11/24 - Maureen: Superior, Stout and EC have touched base. EC has requested help with some queries. Superior has signed off. EC will upload spreadsheet but have not yet. Felt comfortable and have verbal signoff. All campuses have indicated that testing migrated data was fine. Moved on to functional testing. Complete.

453 Review functionality, integration with full test load

Owner: Maureen

11/10 - Maureen: Will contact Katie and Dineen to discuss what their plan will be for testing. Scott: suggested giving them some concrete steps to plan around - here's what we are going to test and our expected results. Maureen: communicate to campuses where to report issues - what team will be addressing issues - what functional area. May add another functional area called Resource Sharing so they can flag issues. Need to make someone responsible for this new area. This may be Katie. Bruce: Added the new functional area during the discussion. Mitch: Approved of this as a flagged issue. Maureen: need test protocols both from the patron side and the Alma side, (Dineen and Katie). Bruce will work with them on the protocol.

11/17 - Maureen: Beginning today as scheduled. Each area has their testing protocols on their wiki pages. Discovery could do a little more defining around Resource Sharing, otherwise the protocols are all there. Will send out a note to campus contacts today with links to protocols.

11/24 - Maureen: Modified the testing protocol pages to make things more useable. Still working on the Resource Sharing area - protocols are still being developed. Discovery is creating a document (checklist) for the testing. Should the team encourage other teams to do the same thing? Bruce: agreed to the idea. Mitch: does it relate to the FAQ? Can they be merged? Bruce: FAQ is gathering the things we've learned. This feels more like a defined protocol for each team's testing. An indicator of success. Mitch: can we use the Discovery template as a mechanism? Maureen: will ask Katie to share what she develops with the other teams. Redmine issues are being worked. So far 120 open issues in Redmine. Are being reviewed in a timely manner.

12/1 - Maureen: Redmine issues are moving. 2 new this past week. Communicated the existence of feedback forms to the teams. Will mention again at tomorrow's All Reps meeting. 33 issues have been reported to EL. 46 are in functional team reviewing.

12/8 - Maureen: Discovery has been re-doing some things with EL. Has made it challenging to test the Disc. layer of this. Can we extend the functional testing for this? Mitch: We are supposed to have the new Alma today to see what has been fixed. We'll want to follow up on SF tickets that pertain to the code. Need to remind the campuses that this is the last week for campus testing. Training will reveal additional issues. Will ask EL today how they view the 12/19 migration issue deadline. Maureen: Will meet with Michael and draft a memo reminding that this is the last week of the testing and the EL reporting deadline.

12/15 - Maureen: Some campuses have posted results. Will send a reminder email. 202 issues in Redmine, 190 show open, but only 9 in new status. 47 items in functional team review. Team will continue monitoring cases and keeping them moving.

12/22 - Maureen: Resource Sharing testing will continue as the issues are worked.

454 All migration issues reported to EL

Owner: Bruce

12/22 - Maureen: Migration issues in Redmine have been reported in SF. Mitch: Issues are essentially documented.

456 Populate Alma KB

Owner: Bruce

2/10 - Bruce: Have posted some docs. Will create troubleshooting docs for patron processing.

3/3 - Bruce: Have an inventory page on wiki for what needs to be moved.

4/28 - Bruce: Still need to make documentation decisions.

457 Purge Patrons

Owner: Bruce

Purge patrons in Voyager prior to migration. This is at the discretion of the LAMS. Schedule for LAMS meeting, 2/22. Mitch will put this on the agenda. When is it practical to do the purge? Need decision by? (up to LAMS) Owner: Bruce

458 Create Project Close Punch List

Owner: Mitch, Paula, Tech Data

Goal: Create a project close punch list to correspond to the 7/1-7/17 status review item on the project timeline. Include and define all items that must be reviewed, confirmed or performed during this period, responsible parties, and deadline for completion of all items. Includes final system status review to identify and resolve existing mission-critical issues at all campuses.

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3/17 - Paula and Mitch will discuss tomorrow.
3/18 - Mitch: Open case review and prioritization of those that are defined as core to a successful migration. Also a risk assessment revisited. Review functionality, open tickets, other items that are not SF tickets (ex. patron processing functionality). Functional teams confirming functionality and processes - link to SF tickets where applicable. Identify the stakeholders and determine their input during this period. Solicit feedback to confirm/deny the recommendations of those stakeholders. Schedule feedback from the campus contacts re: the feedback from their patrons. User interface analysis results? Will schedule a brainstorm meeting to begin a rough list.

3/24 - Will schedule a meeting - Paula and Mitch.

4/7 - Paula - will work this with Mitch tomorrow.

4/21 - Paula: Working the final details with Mitch.

4/28 - Paula - Working details with Mitch.

460 Run OCLC Local Holdings for Mad and MKE

Owner: Scott

2/24 - Scott: MKE and Madison. After Voyager catalog is frozen, will run a final Voyager process to dump local holdings for MKE and Mad and send to OCLC.

4/21 - Scott: Complete. Both Rapid and OCLC.

461 PCirc Job 43

Owner: Mitch

Clearing of UB patrons for Madison. Has not worked for Madison for years. Many sites run this daily.

2/24 - Mitch: Ongoing. Still not working. Job should run on 4/22. Have a new binary that they are testing.

3/3 - Mitch: EL continues to work on this. New binary that is being tested. No update from EL. Waiting for status from Adriana.

3/10 - Mitch absent from meeting.

3/17 - No update. Paula will ask Mitch.

3/18 - Mitch: Updated Tim yesterday. Received confirmation that basic function is working - throwing some errors. Met 3/5 w/EL migration team and Dineen. Correctly cleaning up local patron references to UB stubs. Tim and Brian will run 4/17.

3/24 - Mitch: Plotted on the cutover plan. Nothing more on this issue. Waiting for Tim and Brian. They have confirmed.

3/31 - No update.

4/7 - Mitch: On the plan.

4/21 - Mitch not at meeting.

4/28 - Mitch: Complete.

464 Purge Voyager Patrons

Owner: Bruce Barton

1/27 - Added by Mitch - Communicate reminder to campuses to purge their Voyager patrons - by 4/15

2/24 - Mitch will touch base with the LAMS on Monday.

4/7 - Mitch: LAMS are talking about this. Documentation is being vetted. Colleges has run it and confirmed.

4/21 - Maureen: Documentation sent to LAMS. Sent to campuses. No mechanisms for feedback. Treating this as an advised thing to do - not required. If we want people to report back, should let the LAMS know. Scott: recommends this. Old records may cause conflicts. Maureen: expectation each campus would do this and report back - ask Mitch to discuss this with LAMS. Scott: will send this out to the LAMS as part of the patron processing group.

4/28 - Mitch: Campuses have purged their patrons. Jay: Followed up on the wiki for reporting. A handful left.

465 Patron Processing

Owner: Scott

2/17 - Bruce: Periodic processess configured and running for all campuses. Begin 5/21; end 5/27. Firing up of patron processing. Will bring up campuses one at a time starting with those who do daily updates.

466 Patron Group Mass Updates

Owner: Madison Patron Team

2/17 - A one-time process that extracts patrons, maps Voyager groups onto Alma groups, resolves issues with duplicate identifiers, and reloads the patron data into Alma. Begin 5/20; end 5/27. Scott is testing over the next 2 weeks. Will create an update process.

468 ILLiad ETL

Owner: Scott

2/17 - Bruce: Patron ILLiad ETL configured and running for all campuses. Begin 5/20; end 5/27. Extract and load process online.

469 ILLiad Match Points

Owner: Scott

2/17 - Bruce: Update Eau Claire and Whitewater match points in ILLiad and coordinate with Shibleoth data providers. Begin 5/20; end 5/27 (or after Eau Claire's semester closes).

470 Illiad Patron Ingest Process

Owner: Bhaswati

Update 13 campuses patron ingest process to handle identifier changes. Begin development at Atlas 4/1 (estimated); deploy in production 5/20.

4/7 - Scott: Until Atlas has a test server ready, we are not going to know. Two campuses will be affected - EC and WW. Email to Dan H at EC yesterday advising him of the changes. Don't know where WW is yet.

4/21 - Bruce: pushing out the date to 5/20.

472 Legacy Retirement Plan

Owner: Tech Data

Goal: Create the Legacy System Retirement Plan.

3/10 - Bruce: Had initial discussion. 1. When do we shut down the Voyager instance - est. 2 months. 2. What to do with the data and how to make it available beyond retirement. Determining requirements after go-live. Will work with the sys admins.

3/13 - Mitch: Discuss what has to be done prior to shutting it down. Brian Wilson and Tim L. What actions must they take? Will contact Brian and Tim.

3/17 - Bruce: Talk to Mitch and schedule a call with Brian and Tim.

4/7 - Mitch: No update. Mitch will schedule a call with Brian and Tim.

4/28 - Mitch: Will discuss today in Tech Data meeting. May retain Voyager until 7/3.

473 Legacy Access

Owner: Tech Data

Goal: Create the Legacy System Access plan. This plan will establish legacy access needs through cutover and until Voyager is shut down.

3/10 - Bruce: will need to keep the databases spinning and there are costs involved in that.

3/13 - Mitch: Marks as read only prior to 5/20. Access post go-live for database checking for whatever reason. What day do we turn off the box? Contract retains legacy 90 days post go-live. Propose retaining 60 days, remove access for 30 days - leave it spinning - if no issues, turn it off at 90 days.

3/17 - Bruce: Mitch's plan sounds fine.

4/7 - Mitch: Need to talk through the details with Brian and Tim and Bruce.

4/28 - Mitch: Will discuss in today's TD meeting.

474 Legacy Archive Creation

Owner: Tech Data

Goal: Create the archive of legacy data.

3/13 - Mitch: Doubtful that there is anything archival about this environment. All required data migrates. Is there a final backup? Format? Storage? Will talk with Brian and Tim. How long do we retain the backup. Vet records retention policy aspect with SC.

3/17 - Bruce: Likely a snapshot - be able to go back and verify if something odd is detected in Alma - determine if Alma is the cause or if it was also that way in Voyager. Perhaps retain for 6 months?

476 Lessons Learned from Test Load

Owner: Maureen

2/3 - Bruce: Examine the test load process and determine successes and areas for improvement for the final load process. Discuss with Mitch - who should be involved. Schedule a live web meeting.

2/17 - Bruce: Survey in the field. Will confirm a date with Mitch for the live meeting.

2/17 - Email from Bruce: Meeting date 3/3.

2/24 - Bruce: Will review next Tuesday w/campus reps.

3/3 - Bruce: Pushed out to the 3/10 meeting.

3/10 - Bruce: meeting is today.

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3/17 - Bruce: Met last week. Complete.

477 Acceptance Testing Protocol Development

Owner: Maureen

2/10 - Bruce: Will do a debrief with the testers from the test load. Meeting today to plan the process and begin improving the documentation.

2/17 - Bruce: Survey is in the field. Will follow up with meeting - all reps. Are waiting for someone from EL to tell us what numbers they actually collect.

2/24 - Bruce: Following up with campuses who haven't responded.

3/3 - Bruce: Following up with campuses. Have responses except Sup. Next step: evaluate results to determine what adjustments need to be made.

3/10 - Bruce: Scheduled to happen this month. Using the survey and meeting feedback to inform changes in the existing protocol. Maureen: at what point is this pushed out to the contacts? Bruce: first week of April ahead of the tech/services freeze.

3/17 - Teams give feedback by 3/31. Have it out no later than 4/4 to all reps. (shooting for 4/2).

3/24 - Bruce: meeting this afternoon to discuss what needs to be done. Have info from EL re: gross measures. At what point will analytics be updated? Need to ask EL. Bruce will email Adriana.

3/31 - Bruce: Will put the protocols in a spreadsheet and let that be the vehicle for reporting gross measures. There is a wiki page.

4/7 - Mitch: Protocols are posted. Analytics question answered - will be updated.

478 Post Testing Assessment - Resource Sharing & Eshelf

Owner: Tech Data, Fulfillment, Discovery

2/20 - Mitch & Bruce: When functionality testing is complete and all tasks identified as critical are identified and tested. Under the protocols, each team performs functional testing. Work with all FTCs to determine if there are any outstanding functional issues. Discuss the state of resource sharing and eshelf with Discovery and Fulfillment. Deliverable: Risk analysis for Steering Committee including: what is resolved, what is not resolved, established workflows and workarounds. Establish go/no-go and/or strategy for isolated issues that are not ready but are not mission-critical to go-live. Dineen and Katie work with other FTCs to solicit input and then meet with Bruce. Bruce submits report to Mitch who takes it to Steering.

3/17 - Bruce: Will provide support where required. Waiting for input from the RS team.

3/24 - Mitch: Last week of RS testing. Using the spreadsheet of remaining issues. After this week will be doing a final assessment of this functionality - expecting it will be a go with workarounds in place. Next step - confirm functionality after the April release.

3/31 - Bruce: Sent note to campuses for eshelf testing. Due Thursday.

479 April: Review Release Notes

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

3/31 - Bruce: Will send reminder today to the team leads that this should be done and they should notify Mitch of red flags by Monday.

4/7 - Mitch: Completed.

480 Functionality Acceptance Sign-Off

Owner: Bruce

2/20 - Bruce: Functionality tests final sign-off; UW System signs off on starting migration. Bruce will deliver to Mitch by time TBD, Mitch will deliver to Steering and receive approval if necessary and then notify vendor.

3/24 - Mitch: do we need functional testing at this point and what do we want the teams to provide? Bruce: Ask the teams to confirm their assessment and that there isn't anything outstanding. Mitch: No specific set of functional tests. Scott: remind teams that if they have outstanding tickets - please test again.

4/7 - Mitch: Shared feedback w/Steering. Complete.

481 May: Review Release Notes & Confirm Issue Resolution

Owner: Team Chair

2/20 - Review release notes and confirm issue resolution post monthly Alma release. Review notes, assess impact of changes, test critical functions to make certain they are ready.

482 Customer Data Acceptance Testing

Owner: Tech Data and Mitch

2/20 - Customer data testing of clean data on prod. Times TBA. Does TS resume in Alma on 5/13? This is the application of testing protocols by Campus reps. Each campus must test their own data. Meeting with reps on 3/3 to discuss process.

483 Testing - Clean Patron, Loan & Request Data

Owner: Tech Data, Fulfillment

2/20 - Customer data testing of clean patron, loan, and request data on prod (4 hours, TBA). Test offline transactions in Alma (1 hour TBA). Fulfillment Team interfaces with Campus Reps (coordinating with their fulfillment staff.) Fulfillment reports to Tech Data. Bruce reports to Mitch for customer acceptance of the Alma environment.

484 Verify Primo

Owner: Discovery, Primo Steering, Tech Data

2/20 - Verify Primo with full clean data re-published and verify EShelf update if necessary. Can we start on the 18th? Mitch has the question pending with EL. Discovery Team works with campuses. Each campus must test - Campus Reps coordinating with their discovery staff. Testing window deadline time TBA.

486 Develop ER Shared Practices

Owner: Jen Holman

11/18 - Jen: See this as an outcome of the functional testing - present campuses with best practices and workflows.

11/25 - Jen: After go live have discussions with the CDC about the shared e collection and how it can be managed centrally and decide who will be responsible for that. Start the conversation with the shared electronic collections.

2/10 - Jen: It may be the NZ team that discusses this.

2/11 - Paula: sent an email to Mitch requesting his input.

2/12 - Email from Mitch: This is a tough one as it crosses functional areas and is very general as written. The issues here should be detailed and then raised with the NZ working group so that they can consider in the context of their recommendations for NZ processes and policies. The NZ working group exists under Tech/Data (though arguably it could/should exist under Resource management). The specifics of this work would seem to ultimately fall more logically to resource management. Sooo, where does that leave us? Perhaps it exists both in ERM and Tech/Data (NZ) and then either can engage Resource Management as needed.

Related to this was a comment yesterday from Jim Lowrey that we may wish to merge Resource Management and ERM in the future as there is so much overlap. In retrospect I think I would have done this from the start had I known then what I know now. Not a major deal, but something we'll consider moving forward.

2/12 - Paula - suggested to Mitch that this be discussed in the S&W meeting today - he agreed - Jen brought it ups. Much discussion. Will be taken offline in it's own meeting for further discussion.

2/17 - Bruce: Meeting has not been scheduled. How will shared e resources be managed? (Natalie?) What will be the practices for managing this work in Alma? How do we ensure that configuration is enabled for campus access?

487 Piece Counts

Owner: Dineen Grow

10/6 - Dineen: Post migration clean-up. Discovered that the piece information is in the summary index of the item record but it needs to be in the fulfillment note on order to be visible at either charge or discharge. have to run a report prior to migration (voyager) so we know what we have to clean up. 200,000 records included in this cleanup. Will catch them as they come to the desk for check out. Students might miss some. Will also have the report and can work from that as time permits.

2/2 - Dineen: Transfer this item to Tech/Data

2/17 - Bruce: Discussion ongoing. Needs to occur after tech services comes live again. Populating a fulfillment note based on an inventory value. Used when you charge and discharge items like scores (multiple pieces). Have the process and have tested it in Alma.

489 Project Close Activities

Owner: Tech Data

Goal: Conduct final system status review and identify and resolve existing mission-critical issues at all campuses.

490 Locally Enhanced Records

Owner: Karen Rattunde

Enhancements written to Network Zone records. Estimated begin 6/15; end 7/15.

491 Data Cleansing

Owner: Susan Foran

A one-time process to cleanse Network Zone bibliographic data and make it RDA compliant. Estimate September 2015.