# I-Share Implementation Task List 2013-2014

| | A | B | C | F | G |
|---|---|---|---|---|---|
| 1 | Deadlines and Trainings | Whose Task / CARLI | Assign port numbers — Task Description | Start Date | Finish Date 5/16/13 |
| 3 | | CARLI | Setup FTP directories on test | 5/16/13 | 5/16/13 |
| 4 | | CARLI | CARLI gathers 6 libraries IP ranges for authenticating access to secured docs on CARLI web | 5/16/13 | 5/24/13 |
| 5 | | | **PLANNING TASKS** | | |
| 6 | | CARLI, Ex Libris | Ex Libris contract amendment | | |
| 7 | Training | CARLI, Libraries | Project Review/Data Conversion Orientation **webinar** | | 6/20/13 |
| 8 | | | | | |
| 9 | | | **DATA MIGRATION PLANNING** | | |
| 10 | | CARLI | CARLI staff build databases on test server for test loads | | 6/7/13 |
| 11 | **Deadline!** | Libraries | First draft DMQs due to EXL | | 7/8/13 |
| 12 | Training | CARLI, Libraries, Ex Libris | Data **conference calls** with library staff, CARLI and EXL | 7/11/13 | 7/12/13 |
| 13 | | CARLI, Ex Libris | CARLI and EXL tech staff conference call re: test server prior to start of test load cycle | 7/22/13 | 7/26/13 |
| 14 | Training | CARLI, Libraries | MFHD Workshop in Champaign (1-day training) | 7/24/13 | 7/24/13 |
| 15 | **Deadline!** | Libraries | Final data specs (DMQs) and list of all types of loads to be done to EXL | 8/1/13 | 8/2/13 |
| 16 | **Deadline!** | Libraries | First draft ABBA and other tables to EXL | 8/1/13 | 8/2/13 |
| 17 | | CARLI | CARLI staff build training databases and associated WebVoyages | | 8/1/13 |
| 18 | | CARLI | CARLI staff prepare Voyager client Update Checker for new libraries | | 8/1/13 |
| 19 | | CARLI | CARLI staff work with OCLC to add new libraries to group subscription (to start in time for cataloging gap) | | 10/15/13 |
| 20 | | | | | |
| 21 | | | **TEST DATA LOADS** | | |
| 22 | **Deadline!** | Libraries | Extracts of TEST bib load (bibs/authorities/mfhds/items) data due to EXL | | 8/9/13 |
| 23 | Training | CARLI, Libraries | Data Review Training in Champaign (1-day training) | 8/14/13 | 8/14/13 |
| 24 | | Ex Libris | Processing of test bib/mfhd/item/auth records by ExL Professional Services | | 8/23/13 |
| 25 | | Ex Libris | Test bib loads | 8/26/13 | 8/30/13 |
| 26 | | Libraries | Test bib load reviews | 9/3/13 | 9/6/13 |
| 27 | **Deadline!** | Libraries | Test bib load acceptance due | 9/9/13 | 9/9/13 |
| 28 | | Ex Libris | EXL does fixes to bib load code (if required) | 9/10/13 | 11/11/13 |
| 29 | **Deadline!** | Libraries | Extracts of TEST patron records due to EXL | | 9/10/13 |
| 30 | **Deadline!** | Libraries | First draft Patron group mapping tables to EXL | | 9/10/13 |
| 31 | | Ex Libris | Processing of test patron records by ExL Professional Services | 9/11/13 | 9/18/13 |
| 32 | Training | CARLI, Libraries | System Administration Profiling Workshop in Champaign (1-day training) | 9/18/13 | 9/18/13 |
| 33 | | Ex Libris | Test patron loads | 9/18/13 | 9/25/13 |
| 34 | | Libraries | Test patron load reviews | 9/23/13 | 9/27/13 |
| 35 | **Deadline!** | Libraries | Test patron load acceptance due | 9/30/13 | 9/30/13 |
| 36 | **Deadline!** | Libraries | Libraries setup Circ System Administration in preparation for test circ loads | 10/1/13 | 10/7/13 |
| 37 | | CARLI | CARLI reviews SysAdmin in preparation for test circ loads | 10/8/13 | 10/9/13 |
| 38 | **Deadline!** | Libraries | Extracts of TEST circ data due to EXL | 10/11/13 | 10/11/13 |
| 39 | | Ex Libris | Processing of test circ records by ExL Professional Services | 10/14/13 | 10/18/13 |
| 40 | Training | CARLI, Libraries | Cataloging Client Training in Champaign (2-day training) | 10/17/13 | 10/18/13 |
| 41 | | Ex Libris | Test circ load | 10/21/13 | 10/22/13 |

| | A<br>Deadlines and Trainings | B<br>Whose Task | C<br>Task Description | F<br>Start Date | G<br>Finish Date |
|---|---|---|---|---|---|
| 42 | | Libraries | Test circ load reviews | 10/23/13 | 10/25/13 |
| 43 | **Deadline!** | Libraries | Test circ load acceptance due | 10/28/13 | 10/28/13 |
| 44 | | | | | |
| 45 | | | **PRODUCTION DATA LOADS** | | |
| 46 | | Libraries | Sites quit cataloging in current systems. Cataloging gap begins. | | 11/1/13 |
| 47 | **Deadline!** | Libraries | Extracts of PRODUCTION bib load (bibs/authorities/mfhds/items) data due to EXL | | 11/4/13 |
| 48 | **Deadline!** | Libraries | Libraries final data mappings (ABBA tables, etc) due | | 11/4/13 |
| 49 | | Ex Libris | Processing of production bib/MFHD/item/auth records by ExL Professional Services | 11/5/13 | 11/8/13 |
| 50 | | Ex Libris | Production bib loads | 11/11/13 | 11/14/13 |
| 51 | | Libraries | Production bib load reviews | 11/15/13 | 11/20/13 |
| 52 | **Deadline!** | Libraries | Libraries production bib load acceptance due. Live on Voyager for cataloging. Cataloging gap ends. | | 11/21/13 |
| 53 | | | CARLI sets up FTP directories on Files server before libs go live with cataloging | | 11/15/13 |
| 54 | **Deadline!** | Libraries | Libraries do Cataloging and Security SysAdmin work | | 11/21/13 |
| 55 | | CARLI | CARLI staff add libraries to daily OCLC load scripts | | 11/21/13 |
| 56 | | CARLI | CARLI staff add custom indexes to DBs and perform regens (overnight) | | 11/22/13 |
| 57 | | CARLI | CARLI staff update UB lookup tables in all DBs | | 11/22/13 |
| 58 | **Deadline!** | Libraries | Extracts of PRODUCTION patron records due. Sites quit updating patron records in current systems. Patron record gap begins. | | 11/22/13 |
| 59 | **Deadline!** | Libraries | Libraries final patron group code mappings due | | 11/22/13 |
| 60 | **Deadline!** | Libraries | Deadline for completing UB patron mapping worksheets | | 11/22/13 |
| 61 | **Deadline!** | Libraries | Deadline for decision on supporting local call slip processing | | 11/22/13 |
| 62 | | CARLI | Thanksgiving Holiday - CARLI Office closed | 11/28/13 | 11/29/13 |
| 63 | **Training** | CARLI, Libraries | Circulation Client Training | 12/3/13 | 12/3/13 |
| 64 | **Training** | CARLI, Libraries | Searching and Requesting via VuFind and UB Training | 12/4/13 | 12/4/13 |
| 65 | **Training** | CARLI, Libraries | Circ/Searching/UB training **snow date** | 12/5/13 | 12/6/13 |
| 66 | | Ex Libris | Processing of production patron records by ExL Professional Services | 11/22/13 | 12/6/13 |
| 67 | | Ex Libris | Production patron loads | 12/6/13 | 12/6/13 |
| 68 | | Libraries | Production patron reviews | 12/9/13 | 12/10/13 |
| 69 | **Deadline!** | Libraries | Production patron load acceptance due | 12/11/13 | 12/11/13 |
| 70 | | CARLI | CARLI staff add libraries to routine daily cataloging batch processing | | 12/11/13 |
| 71 | | CARLI | CARLI staff establish production OPAC interfaces for all libs | 12/11/13 | 1/13/14 |
| 72 | | CARLI | CARLI staff add UB patron types to SysAdmin | | 12/12/13 |
| 73 | | Libraries | Libraries setup Circ SysAdmin in preparation for production circ loads | 12/13/13 | 12/18/13 |
| 74 | **Deadline!** | Libraries | Libraries deadline for completing UB patron group rules/matrices in SysAdmin | | 12/18/13 |
| 75 | | CARLI, Libraries | CARLI reviews SysAdmin in preparation for circ loads | 12/19/13 | 12/20/13 |
| 76 | | CARLI | Winter Holidays - CARLI Office closed | 12/23/13 | 1/1/14 |
| 77 | **Deadline!** | Libraries | Extracts of PRODUCTION circ data due to EXL. Circulation gap begins. | | 1/6/14 |
| 78 | | Ex Libris | Processing of production circ data by ExL Professional Services | 1/7/14 | 1/8/14 |
| 79 | | Ex Libris | Production circ loads | 1/8/14 | 1/9/14 |
| 80 | | Libraries | Production circ review | 1/9/14 | 1/10/14 |

| | A | B | C | F | G |
|---|---|---|---|---|---|
| 1 | **Deadlines and Trainings** | **Whose Task** | **Task Description** | **Start Date** | **Finish Date** |
| 81 | **Deadline!** | Libraries | Production circ load acceptance due. | | 1/10/14 |
| 82 | | CARLI | CARLI copies production databases from voyager-test to voyager. | 1/10/14 | 1/13/14 |
| 83 | | Libraries | Libraries edit their voyager.ini file to point to voyager.carli.illinois.edu | 1/13/14 | |
| 84 | | Libraries | **LIVE ON VOYAGER FOR LOCAL OPERATIONS.** | 1/13/14 | |
| 85 | | CARLI | CARLI staff add libraries to routine daily circulation batch processing | | 1/13/14 |
| 86 | | CARLI | MLK Holiday - CARLI Office closed | | 1/20/14 |
| 87 | | | | | |
| 88 | | CARLI | UB Integration for I-Share. **LIVE FOR RESOURCE SHARING**. | 1/22/14 | 1/23/14 |
| 89 | | CARLI | Libraries data loaded and displayed in I-Share union catalog | 1/24/14 | 1/31/2014 |
| 90 | **Training** | CARLI, Libraries | Acquisitions/Serials Client Training (2-day training) | 1/21/14 | 1/22/14 |
| 91 | **Training** | CARLI, Libraries | Acquisitions/Serials Client Training (2-day training) **snow dates** | 1/23/14 | 1/24/14 |
| 92 | **Training** | CARLI, Libraries | Voyager Reports/Reporting Training (1-day training) | 2/10/14 (week of) | 2/14/14 |
| 93 | | | | | |