# I-Share Implementation Task List 2016

| | A | B | C | D | G | H |
|---|---|---|---|---|---|---|
| 1 | Done? | Deadlines and Trainings | Whose Task | Task Description | Start Date | Finish Date |
| 5 | | | | **PLANNING TASKS** | | |
| 6 | ✓ | | CARLI, Ex Libris | Ex Libris contract amendment | | |
| 7 | | | | **DATA MIGRATION PLANNING** | | 12/11/2015 |
| 8 | ✓ | | CARLI | CARLI staff build databases on test server for test loads | | 12/11/2015 |
| 9 | ✓ | | CARLI | CARLI staff build training databases and associated WebVoyages | | 12/11/2015 |
| 10 | ✓ | | CARLI | CARLI staff prepare Voyager client Update Checker for new libraries | | 12/11/2015 |
| 11 | | | CARLI | CARLI staff work with OCLC to add new libraries to group subscription (to start in time for cataloging gap) | | 12/11/2015 |
| 12 | ✓ | | CARLI | CARLI sets up FTP directories on Files server before libs go live with cataloging | | 12/15/2015 |
| 13 | ✓ | Training | CARLI, Libraries | Project Review/Data Conversion Orientation **webinar** | | 1/15/2016 |
| 14 | ✓ | | FYI | MLK Day | | 1/18/2016 |
| 15 | ✓ | Deadline! | Libraries | First draft DMQs due to EXL | | 2/5/2016 |
| 16 | ✓ | Training | CARLI, Libraries, Ex Libris | Data **conference calls** with library staff, CARLI and EXL | 2/8/2016 | 2/12/2016 |
| 17 | ✓ | Training | CARLI, Libraries | MFHD Workshop in Champaign (1-day training) | **2/24/2016** | 2/25/2016 (SNOWDATE) |
| 18 | ✓ | Deadline! | Libraries | Final data specs (DMQs) and list of all types of loads to be done to EXL | 3/1/2016 | 3/1/2016 |
| 19 | ✓ | Deadline! | Libraries | First draft ABBA and other tables to EXL | 3/1/2016 | 3/1/2016 |
| 20 | | | | **TEST DATA LOADS** | | 3/1/2016 |
| 21 | ✓ | Deadline! | Libraries | Extracts of TEST bib load (bibs/authorities/mfhds/items) data due to EXL | | **3/1/2016** |
| 22 | ✓ | Training | CARLI, Libraries | Data Review Training in Champaign (1-day training) | **3/9/2016** | 3/11/2016 (SNOWDATE) |
| 23 | ✓ | | Ex Libris | Processing of test bib/mfhd/item/auth records by ExL Professional Services | 3/2/2016 | 3/16/2016 |
| 24 | ✓ | | Ex Libris | Test bib loads | 3/16/2016 | 3/18/2016 |
| 25 | ✓ | | FYI | Good Friday | | 3/25/2016 |
| 26 | ✓ | | Libraries | Test bib load reviews | 3/21/2016 | 3/31/2016 |
| 27 | ✓ | Deadline! | Libraries | Test bib load acceptance due | 4/1/2016 | 4/1/2016 |
| 28 | ✓ | Deadline! | Libraries | First draft Patron group mapping tables to EXL | | 4/5/2016 |
| 29 | ✓ | Deadline! | Libraries | Extracts of TEST patron records due to EXL | | 4/5/2016 |
| 30 | ✓ | | Ex Libris | Processing of test patron records by ExL Professional Services | 4/6/2016 | 4/13/2016 |
| 31 | ✓ | Training | CARLI, Libraries | System Administration Profiling Workshop (1-day training) - Scheduled with each library. | | 4/14/2016 |
| 32 | ✓ | | Ex Libris | Test patron loads | 4/14/2016 | 4/14/2016 |
| 33 | ✓ | | Libraries | Test patron load reviews | 4/15/2016 | 4/19/2016 |
| 34 | ✓ | | Ex Libris | EXL does fixes to bib load code (if required) | 4/5/2016 | 5/13/2016 |
| 35 | ✓ | Deadline! | Libraries | Test patron load acceptance due | 4/20/2016 | 4/20/2016 |
| 36 | ✓ | Deadline! | Libraries | Provide required information so CARLI can proceed with SysAdmin set up | 4/20/2016 | 4/20/2016 |
| 37 | ✓ | | CARLI | CARLI setup Circ and other required System Administration in preparation for test circ loads | 4/20/2016 | 4/27/2016 |

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| 38 | ✓ | | Libraries | Libraries review SysAdmin setup in preparation for test circ loads | 4/28/2016 | 5/4/2016 |
| 39 | ✓ | Deadline! | Libraries | Extracts of TEST circ data due to EXL | | 4/28/2016 |
| 40 | ✓ | Training | CARLI, Libraries | Cataloging Client Training in Champaign (2-day training) | 5/5/2016 | 5/6/2016 |
| 41 | ✓ | | FYI | ELUNA -- Oaklahoma City, OK | 5/3/2016 | 5/6/2016 |
| 42 | ✓ | | Ex Libris | Processing of test circ records by ExL Professional Services | 4/29/2016 | 5/4/2016 |
| 43 | ✓ | | Ex Libris | Test circ load | 5/5/2016 | 5/10/2016 |
| 44 | ✓ | | Libraries | Test circ load reviews | 5/11/2016 | 5/12/2016 |
| 45 | ✓ | Deadline! | Libraries | Test circ load acceptance due | | 5/12/2016 |
| 46 | ✓ | | | **PRODUCTION DATA LOADS** | | 5/13/2016 |
| 47 | ✓ | | Libraries | Sites quit cataloging in current systems. Cataloging gap begins. | | 5/13/2016 |
| 48 | ✓ | Deadline! | Libraries | Extracts of PRODUCTION bib load (bibs/authorities/mfhds/items) data due to EXL | | 5/13/2016 |
| 49 | ✓ | Deadline! | Libraries | Libraries final data mappings (ABBA tables, etc) due | | 5/13/2016 |
| 50 | ✓ | Training | CARLI, Libraries | Circulation Client Training | 5/17/2016 | 5/17/2016 |
| 51 | ✓ | Training | CARLI, Libraries | Searching and Requesting via VuFind and UB Training | 5/18/2016 | 5/18/2016 |
| 52 | ✓ | | Ex Libris | Processing of production bib/MFHD/item/auth records by ExL Professional Services | 5/16/2016 | 5/20/2016 |
| 53 | ✓ | | Ex Libris | Production bib loads | 5/23/2016 | 5/25/2016 |
| 54 | ✓ | | Libraries | Production bib load reviews | 5/26/2016 | 6/1/2016 |
| 55 | ✓ | | FYI | Memorial Day Holiday | 5/30/2016 | 5/30/2016 |
| 56 | ✓ | Deadline! | Libraries | Extracts of PRODUCTION patron records due. Sites quit updating patron records in current systems. Patron record gap begins. | | 5/31/2016 |
| 57 | ✓ | Deadline! | Libraries | Libraries final patron group code mappings due | | 5/31/2016 |
| 58 | ✓ | Deadline! | Libraries | Deadline for completing UB patron mapping worksheets | | 5/31/2016 |
| 59 | ✓ | Deadline! | Libraries | Deadline for decision on supporting local call slip processing | | 5/31/2016 |
| 60 | ✓ | Deadline! | CARLI, Libraries | CARLI and Libraries do System, Security, and Cataloging SysAdmin work | | 6/2/2016 |
| 61 | ✓ | Deadline! | Libraries | Libraries production bib load acceptance due. Live on Voyager for cataloging. Cataloging gap ends. | | 6/2/2016 |
| 62 | ✓ | | CARLI | CARLI staff add libraries to daily OCLC load scripts | | 6/2/2016 |
| 63 | ✓ | | CARLI | CARLI staff add custom indexes to DBs and perform regens (overnight) | | 6/2/2016 |
| 64 | ✓ | | CARLI | CARLI staff update UB lookup tables in all DBs | | 6/2/2016 |
| 65 | ✓ | | Ex Libris | Processing of production patron records by ExL Professional Services | 6/1/2016 | 6/7/2016 |
| 66 | ✓ | | Ex Libris | Production patron loads | 6/8/2016 | 6/8/2016 |
| 67 | ✓ | | Libraries | Production patron reviews | 6/9/2016 | 6/10/2016 |
| 68 | ✓ | Deadline! | Libraries | Production patron load acceptance due | | 6/13/2016 |
| 69 | ✓ | | Ex Libris | MLS Data migration, authority load, CARLI index definition load, and reindexing | 6/13/2016 | 6/14/2016 |
| 70 | ✓ | | CARLI | CARLI staff add UB patron types to SysAdmin | | 6/14/2016 |
| 71 | ✓ | | CARLI | CARLI does Circ and Call Slip SysAdmin in preparation for production circ loads | 6/10/2016 | 6/14/2016 |
| 72 | ✓ | Deadline! | CARLI, Libraries | CARLI and Libraries deadline for completing UB patron group rules/matrices in SysAdmin | | 6/14/2016 |
| 73 | ✓ | | CARLI, Libraries | Libraries and CARLI review ALL SysAdmin settings in preparation for circ loads | 6/15/2016 | 6/16/2016 |

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| 74 | ✓ | **Deadline!** | Libraries | Extracts of PRODUCTION circ data due to EXL. Circulation gap begins. |  | 6/17/2016 |
| 75 |  |  | Ex Libris | Processing of production circ data by ExL Professional Services | 6/20/2016 | 6/24/2016 |
| 76 |  |  | FYI | ALA Annual -- Orlando, FL | 6/23/2016 | 6/28/2016 |
| 77 |  |  | Ex Libris | Production circ loads | 6/24/2016 | 6/27/2016 |
| 78 |  |  | Libraries | Production circ review | 6/28/2016 | 6/29/2016 |
| 79 |  | **Deadline!** | Libraries | Production circ load acceptance due. |  | 6/29/2016 |
| 80 |  |  | CARLI | CARLI copies production databases from voyager-test to voyager. | 6/30/2016 | 7/1/2016 |
| 81 |  |  | FYI | Fourth of July Holiday | 7/4/2016 | 7/4/2016 |
| 82 |  |  | Libraries | Libraries edit their voyager.ini file to point to voyager.carli.illinois.edu **LIVE ON VOYAGER FOR LOCAL OPERATIONS.** | 7/1/2016 | 7/1/2016 |
| 83 |  |  | CARLI | CARLI staff add libraries to routine daily circulation batch processing |  | 7/1/2016 |
| 84 |  |  | CARLI | CARLI staff establish production OPAC interfaces for all libs |  | 7/1/2016 |
| 85 |  |  | CARLI | CARLI staff test UB Integration process. | 7/6/2016 | 7/12/2016 |
| 86 |  |  | CARLI | UB Integration for I-Share. **LIVE FOR RESOURCE SHARING**. | 7/13/2016 | 7/15/2016 |
| 87 |  |  | CARLI | Libraries data loaded and displayed in I-Share union catalog | 7/18/2016 | 7/22/2016 |
| 88 |  | **Training** | CARLI, Libraries | Acquisitions/Serials Client Training (2-day training) | Fall 2016 | TBD |
| 89 |  | **Training** | CARLI, Libraries | Voyager Reports/Reporting Training (1-day training) | TBD | TBD |