

	A	B	C	D	G	H
1	Deadlines and Trainings	Complete	Whose Task	Task Description	Start Date	Finish Date
3		✓	CARLI	Setup FTP directories on test and production		8/31/17
4		✓	CARLI	CARLI gathers libraries IP ranges for authenticating access to secured docs on CARLI web		8/15/17
5		✓				
6		✓		PLANNING TASKS		
7		✓	CARLI, Ex Libris	Ex Libris contract amendment		6/30/17
8	Training	✓	CARLI, Libraries	Project Review webinar	8/9/17	8/9/17
9		✓	CARLI, Libraries	Site Visits with new I-Share libraries: ALP 8/25; MBI 8/30; SCJ 8/31; MHC 9/1.	8/25/17	9/1/17
10	Training	✓	CARLI, Libraries	Data Conversion Orientation webinar	9/7/17	9/7/17
11		✓				
12		✓		DATA MIGRATION PLANNING		
13		✓	CARLI	CARLI staff build databases on test server for test loads		8/31/17
14	Deadline!	✓	Libraries	First draft DMQs due to EXL		9/22/17
15	Training	✓	CARLI, Libraries, Ex Libris	Individual data conference calls with library staff, CARLI and EXL	9/25/17	9/29/17
16	Training	✓	CARLI, Libraries	MFHD Workshop webinar . 2 half-day trainings 10/2 and 10/3. Approximately 1:00pm-4:00pm (end time approximate)	10/2/17	10/3/17
17	Deadline!	✓	Libraries	Final data specs (DMQs) and list of all types of loads to be done to EXL		10/13/17
18	Deadline!	✓	Libraries	First draft ABBA and other tables to EXL		10/13/17
19		✓	CARLI	CARLI staff prepare Voyager client Update Checker for new libraries		9/29/17
20		✓	CARLI	CARLI staff work with OCLC to add new libraries to group subscription (to start in time for cataloging gap)	9/1/17	1/12/18
21	FYI	✓	Libraries	Illinois Library Association Conference (Tinley Park, IL)	10/10/17	10/13/17
22		✓				
23		✓		TEST DATA LOADS		
24	Deadline!	✓	Libraries	Extracts of TEST bib load (bibs/authorities/mfhd/items) data due to EXL		10/13/17
25		✓	Ex Libris	Processing of test bib/mfhd/item/auth records by ExL Professional Services	10/16/17	10/30/17
26	Training	✓	CARLI, Libraries	Data Review Training in Champaign (1-day training)	11/2/17	11/2/17
27		✓				
28		✓	Ex Libris	Test bib loads	10/30/17	11/3/17
29		✓	Libraries	Test bib load reviews	11/6/17	11/9/17
30	FYI	✓	Libraries	Veteran's Day Observed		11/10/17
31	Deadline!	✓	Libraries	Test bib load acceptance due		11/13/17
32		✓	Ex Libris	EXL does fixes to bib load code (if required)	11/13/17	1/16/18
33	Deadline!	✓	Libraries	Extracts of TEST patron records due to EXL		11/14/17
34	Deadline!	✓	Libraries	First draft Patron group mapping tables to EXL		11/14/17

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Data Deadline
Other Deadline
Training Dates

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1	Deadlines and Trainings	Complete	Whose Task	Task Description	Start Date	Finish Date
35		✓	Ex Libris	Processing of test patron records by ExL Professional Services	11/14/17	11/21/17
36	Training	✓	CARLI, Libraries	System Administration Profiling Meetings (in Champaign) (1-day meetings)	11/13/17	11/20/17
37	FYI	✓		CARLI Annual Meeting. Champaign, IL	11/17/17	11/17/17
38		✓	Ex Libris	Test patron loads	11/21/17	11/27/17
39	FYI	✓	CARLI	Thanksgiving Holiday - CARLI Office Closed	11/23/17	11/24/17
40		✓	Libraries	Test patron load reviews	11/28/17	12/1/17
41	Deadline!	✓	Libraries	Test patron load acceptance due		12/4/17
42		✓	CARLI	CARLI sets up and reviews Circ System Administration (based on settings discussed at Profiling Meetings) for test circ loads		12/4/17
43	Deadline!	✓	Libraries	Extracts of TEST circ data due to EXL		12/4/17
44		✓	Ex Libris	Processing of test circ records by ExL Professional Services	12/4/17	12/11/17
45	Training	✓	CARLI, Libraries	Cataloging Client Training in Champaign (2-day training)	12/6/17	12/7/17
46		✓	Ex Libris	Test circ load	12/12/17	12/15/17
47		✓	Libraries	Test circ load reviews	12/18/17	12/19/17
48	Deadline!	✓	Libraries	Test circ load acceptance due		12/20/17
49	FYI	✓	CARLI	Christmas Holiday - CARLI Office Closed	12/25/17	1/1/18
50						
51				PRODUCTION DATA LOADS		
52			Libraries	Sites quit cataloging in current systems. Cataloging gap begins.		1/12/18
53	Deadline!		Libraries	Extracts of PRODUCTION bib load (bibs/authorities/mfhd/items) data due to EXL		1/12/18
54	Deadline!		Libraries	Libraries final data mappings (ABBA tables, etc) due		1/12/18
55	FYI		CARLI	MLK Holiday - CARLI Office closed		1/15/18
56			Ex Libris	Processing of production bib/MFHD/item/auth records by ExL Professional Services	1/16/18	1/22/18
57			Ex Libris	Production bib loads	1/22/18	1/26/18
58			Libraries	Production bib load reviews	1/29/18	2/2/18
59	Deadline!		Libraries	Libraries production bib load acceptance due.		2/5/18
60			CARLI	CARLI Staff does Cataloging and Security SysAdmin work based on settings discussed at Profiling Meetings). <i>Once complete Libraries are Live on Voyager for cataloging. Cataloging gap ends.</i>		2/5/18
61			CARLI	CARLI staff add libraries to daily OCLC load scripts		2/5/18
62			CARLI	CARLI staff add custom indexes to DBs and perform regens (overnight)		2/6/18
63			CARLI	CARLI staff update UB lookup tables in all DBs		2/6/18
64	Deadline!		Libraries	Extracts of PRODUCTION patron records due. Sites quit updating patron records in current systems. Patron record gap begins.		2/7/18
65	Deadline!		Libraries	Libraries final patron group code mappings due		2/7/18
66	Deadline!		Libraries	Deadline for decision on supporting local call slip processing		2/7/18
67	Training		CARLI, Libraries	Circulation Client Training	2/7/18	2/7/18
68	Training		CARLI, Libraries	Searching and Requesting via VuFind and UB Training	2/8/18	2/8/18

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Other Deadline
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1	Deadlines and Trainings	Complete	Whose Task	Task Description	Start Date	Finish Date
69	Training		CARLI, Libraries	Circulation Client Training snow date	2/14/18	2/14/18
70	Training		CARLI, Libraries	Searching and Requesting via VuFind and UB Training snow date	2/15/18	2/15/18
71			Ex Libris	Processing of production patron records by ExL Professional Services	2/8/18	2/15/18
72			Ex Libris	Production patron loads	2/16/18	2/16/18
73	FYI			President's Day	2/19/18	2/19/18
74			Libraries	Production patron reviews	2/20/18	2/21/18
75	Deadline!		Libraries	Production patron load acceptance due		2/22/18
76	Deadline!		Libraries	Deadline for completing UB patron mapping worksheets		2/22/18
77			CARLI	CARLI staff add libraries to routine daily cataloging batch processing		2/22/18
78			CARLI	CARLI staff establish production OPAC interfaces for all libs		2/22/18
79			CARLI	CARLI staff add UB patron types to SysAdmin		2/23/18
80			CARLI	CARLI sets up and reviews Circ System Administration (based on settings discussed at Profiling Meetings) for production circ loads	2/23/18	2/26/18
81			CARLI	CARLI completes UB patron group rules/matrices in SysAdmin	2/23/18	2/26/18
82	Deadline!		Libraries	Extracts of PRODUCTION circ data due to EXL. Circulation gap begins.		2/27/18
83			Ex Libris	Processing of production circ data by ExL Professional Services	2/28/18	3/1/18
84			Ex Libris	Production circ loads	3/2/18	3/5/18
85			Libraries	Production circ review	3/6/18	3/7/18
86	Deadline!		Libraries	Production circ load acceptance due.		3/8/18
87			CARLI	CARLI copies production databases from voyager-test to voyager.	3/9/18	3/10/18
88			CARLI	CARLI Staff complete production OPAC interfaces for all libs		3/12/18
89			Libraries	Libraries edit their voyager.ini file to point to voyager.carli.illinois.edu. LIVE ON VOYAGER FOR LOCAL OPERATIONS.		3/12/18
90			CARLI	CARLI staff add libraries to routine daily circulation batch processing		3/12/18
91			CARLI	UB Integration for I-Share. LIVE FOR RESOURCE SHARING.		3/27/18
92			CARLI	Libraries data loaded and displayed in I-Share union catalog		4/2/18
93	Training		CARLI, Libraries	Acquisitions/Serials Client Training (2-day training)	4/11/18	4/12/18
94	Training		CARLI, Libraries	Voyager Access Reports/Reporting Training (1-day training)	TBD	

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