



Summary of Implementation Services

[sample based on SUNY Group4]

May 30, 2003

Initial Implementation Planning Meetings

The implementation process will start off with meetings totally three days held within the first few weeks. They include:

1. OLIS Kickoff
2. Planning for conversion
3. Follow-up workshop on data mapping/conversion

Each campus will be required to participate in an OLIS kick off meeting. This meeting will be used to acquaint the campus with the basic steps in the conversion process and explain OLIS, Ex Libris and campus responsibility. The 3 days outlined below are focusing on Multilis sites.

Day 1

- introduction to Aleph application and concepts
- overview of implementation process (teams, timeframes, milestones)
- communication with OLIS and Ex Libris
- overview of training

Day 2

- planning for data conversion
- overview of Aleph as it relates to data mapping
- SUNY standards
- data mapping considerations and options including those impacting Multilis data
- review of data mapping worksheets, purpose, how to complete

Day 3

- review data mapping worksheets
- answer questions

Implementation Subgroups

- A - Alfred Ceramics, Alfred Tech, Alfred University, Corning
- B - Buffalo State College, Erie, Jamestown
- C - Finger Lakes, Genesee, Geneseo, Monroe

Campus Implementation Plan

The OLIS has developed a Campus Implementation Plan for library conversion to Aleph 500. The OLIS will work with the campus and Ex Libris to customize the implementation plan based on the campus start date, data needs, modules to convert, etc. This Campus Implementation Plan will be used guide the campus, OLIS and Ex Libris through the conversion process. It is assumed that all parties will make good faith efforts to adhere to the schedule developed for each campus.

Group4 Schedule for Data Extracts, Data Loads, and STP Dates

The OLIS has prepared a schedule that indicates dates for campus data extracts, data loads, due dates for data analysis reports and STP dates for Group4. This has been reviewed with Ex Libris. The schedule is distributed and reviewed with campuses at the Day 1 planning meeting.

Data Analysis

The OLIS has developed standard worksheets to assist Multilis campuses in identifying data needs for migration to Aleph 500. OLIS staff will interview library personnel who are familiar with the data in the Multilis system to assist in the identification of campus specific data conversion needs. The interview process and forms will also be used to identify all sources of data (e.g. Multilis, SULOP, Marcive, etc.), and all modules that will be anticipated to be available to the campus upon Aleph 500 Switch to Production (STP). Completed forms will be distributed among OLIS, campus staff and Ex Libris. Campus staff is responsible for keeping the document current with any changes that take place over the course of conversion.

OLIS staff will be available for to assist and advice campus staff in the development of conversion specifications, evaluation of converted data, etc.

Data Extraction

The OLIS will perform Multilis/LAIP data extraction based on requirements of the Data Analysis. For the Multilis Group4 campuses it is anticipated that Alfred University, Buffalo State College, and Geneseo will have test loads made up of both subsets and full loads because all databases are well over 100,000 records. All other campuses will expect to have full data loads for testing.

Prior to the production extract, the OLIS will perform one subset and/or full load extraction for each campus as noted above. This subset will be used for multiple subset loads that occur in the conversion process. OLIS will perform additional data extractions based on conversion requirements.

Training

OLIS staff provides most of the Aleph training. An overview of the training schedule is presented at the Day 1 planning meeting. Ex Libris will provide training for serials and acquisitions. Training is done regionally with representatives from groups of campuses participating. Training will follow a train the trainer model. Attendees at training sessions will provide training to remaining staff at their library. Libraries are expected to select key staff (decision makers) with strong skills who are actively involved in the migration planning process for their library.

SUNY Template and Campus Baseline Configuration

The OLIS has developed a set of Aleph configuration files that will be applied to each campus as a SUNY template. Additionally, the OLIS will customize specific files to create a base line campus configuration. This base line configuration will be available to campuses upon the first load of test data and save campuses considerable time in the conversion process. The base line configuration will provide a functional OPAC configuration, data indexes and configuration of drop down menus in the GUI interface. However, campuses will still be required to devote significant resources and effort to the configuration of the Aleph application.

Server Environment

The Information Technology Exchange Center (ITEC) at Buffalo State College will be providing technology support for Group4 campuses. ITEC will be responsible for creating accounts, performing backups, monitoring system and database performance, maintaining the hardware, Operating System, Oracle and other components as required.

Opening Libraries

Prior to any data being loaded into the Aleph system, ITEC and OLIS must perform the task of “Opening the Library”. The Opening Library process consists of the following tasks and must be performed for each campus instance of the Aleph application:

- Create tablespaces in Oracle
- Run scripts to open the Aleph libraries
- Run scripts to create the PWLib
- Copy the SUNY template of Aleph configuration files
- Customize the template with known campus specific data
- Starting all servers associated with the application
- Performing a check to see that all Oracle tables/indexes and Aleph libraries tables were created, the template and customization is in place and all servers are started

Once the Opening Library process is complete, Ex Libris will be contacted to begin loading and indexing campus data. Ex Libris is responsible for all data conversion programs, data loading and indexing as indicated on the data conversion forms and agreed upon specifications and reviewing the appropriate log files. Once Ex Libris has reviewed the log file, campuses will be contacted to begin the data review process.

Consultations

Library staff are encouraged to schedule consultations with individual OLIS and Ex Libris staff members to discuss various aspects of the implementation process. These consultations generally take the form of extensive telephone conversions to work through specific implementation issues or to work on specific configuration tables.

- Test database analysis – Maggie Horn (OLIS)
- Source data analysis – John Schumacher (OLIS)
- Web OPAC – Laura Murray (OLIS)
- PC Client configuration – Maggie Horn (OLIS)
- Circulation – Ex Libris project leader
- Course Reserves – Ex Libris project leader
- Cataloging – Ex Libris project leader, Maggie as backup
- Reports as provided by Ex Libris – Ex Libris project leader
- Custom Reports – future deliverable for OLIS
- Acquisitions – Ex Libris project leader
- Serials – Ex Libris project leader, Maggie as backup
- Permissions – Ex Libris project leader
- PLIF – Ex Libris project leader, SICAS for Banner sites

Communications

Ex Libris has established a project list for Group4 participants at the address suny4project@listserv.exlibris-usa.com. All Group4 campus contacts will be added by Ex Libris. The list is used by campus and Ex Libris project managers for all questions and responses related to the migration process and data conversion. OLIS staff will receive messages posted to the Ex Libris project list.

There are specific procedures for communication on the list:

- Subject lines of each posting should begin with the three-letter code of the institution posting the query followed by the subject
- Postings for the benefit of all Group4 sites are prefaced by "ALL" in the subject line
- All correspondence related to the implementation process is posted to this project list

The OLIS has established a SUNYConnect LMS list at the address sunylms@ls.suny.edu. The SUNYLMS list is a SUNY-only list designed for discussion about the SUNYConnect Library Management System (ALEPH500). Subscribers include key contacts at the currently implementing libraries as well as representatives from libraries that have already implemented the system.

STP Definition

STP is defined as the approved data conversion and the subsequent production use of any Aleph module in a library. Minimally, this production use will consist of circulation. However, the OLIS recommends to LAIP campuses that all modules currently in use on the legacy system be included in STP. In general, this will mean OPAC, Circulation, Cataloging, and in some cases Serials. We do not recommend that campuses that have never employed an integrated Acquisitions system include Acquisitions in STP.

Post STP and the path to support

Campus project leaders will continue to work with their assigned Ex Libris counterpart for four weeks. During this period, campus staff will be required to document any outstanding configuration issues. Ex Libris will assist the campuses in resolving these configuration issues. Each campus will be allocated a maximum of two on-site consultation days to resolve any problems. At the end of four weeks, the list of configuration issues will be frozen and Ex Libris will have three months to resolve the documented issues. Any new problems found after this four-week period will be sent directly to Ex Libris support.

OLIS staff will be available for consultation to assist SUNY library staff with post-STP issues. Additionally, the OLIS will be developing a group of SUNY Librarians to provide assistance and guidance in the implementation of new modules, development of reports, and other services.

Access to Documentation

Ex Libris provides each site with a CD-ROM containing Aleph500 documentation.

Also be aware of the SUNY Aleph500 Portal Web page at <http://www.sunyconnect.suny.edu/alephportal>. The Aleph500 portal provides links to post-STP web OPACS, SUNY specific Aleph500 codes, download of Putty for SSH connections to your Aleph server, access to the Footprints Knowledgebase, and much more. The portal page is password protected. You can login with the same campus-specific username and password that you are assigned for your Aleph client.