

PINES DEVELOPMENT ROAD MAP..SUBJECT TO CHANGE..UPDATED 02.24.09

2009	January	February	March
<p>DEVELOPMENT</p>	<ul style="list-style-type: none"> • PINES page wireframe adapted. Update complete. • Holds reports cap increased to 200; amnesty resulted in a substantial reduction in holds problems reported; Holds issues remaining will be replicated in the testing environment by the Holds Working Group (see February) • Completed PINES Directors priorities spreadsheet and vetted through the Directors listserv. • Met with Equinox on the following business development issues: <ul style="list-style-type: none"> ○ Software development infrastructure ○ Help Desk update process & workflow ○ Roles & Responsibilities matrix ○ Equinox/PINES project plans ○ Updated invoicing template • Met with Equinox on the following software development issues: <ul style="list-style-type: none"> ○ Daily Cash Report ○ Context Menus • Cleared PINES Help Desk of all tickets that required further development/analysis by PINES team (will incorporate into plans for working groups, PINES team members and the development spreadsheet as appropriate) • The following bug fixes were bolted onto current release: <ul style="list-style-type: none"> ○ Daily Cash Report (needs additional work – will add to dev. Spreadsheet) 	<ul style="list-style-type: none"> • The PINES Directors priorities spreadsheet will be integrated with the master development spreadsheet and prioritized, vetted with Equinox and published to the PINES page. • Once vetted and finalized, the following plans will be released to the PINES libraries. They will provide the infrastructure with which all development will be accomplished: <ul style="list-style-type: none"> ○ Help Desk update process & workflow ○ Roles & Responsibilities matrix ○ Equinox/PINES project plans • Testing environment installed. Should allow for the testing of recent fixes and customizations: (If functional, go live ASAP) <ul style="list-style-type: none"> ○ Unrecovered Debt ○ New OPAC interface ○ Long Overdue ○ Holds Expiration dates • Testing environment also allows for thorough testing of bug fixes and customizations and features in release 1.4: <ul style="list-style-type: none"> ○ Context Menus -- There are now working context menus for cut/copy/paste. ○ Improved admin interfaces in the staff client: this feature will make it easier to make administrative changes to organizational settings, permissions, etc... ○ Multi-source z39.50 client: Catalogers will now be able to connect to more than one source when downloading records in the staff client. If they connect to OCLC and the PINES catalog at the same time, it may help reduce duplicates as they can clearly see if a record is already in place. ○ Pre-overdue notices: it will be a standard feature in 1.4. ○ SRU/z39.50 server. ○ Publication date filtering will be available in the advanced search in the OPAC and staff client. ○ Batch importer/exporter: This will allow you or the libraries (depending on policy) to load bibs and authorities in batch. ○ Sticky search: when you open a new tab, you'll see a brand new search every time. If you stay in the same tab, it will retain the last search. 	<ul style="list-style-type: none"> • EC Meeting -- 030609 • Week of 030909 -- 1.4 functional as expected; go live with Release 1.4. • Development on prioritized issues from master development spreadsheet begins. • Week of 031609 -- Install testing environment in PINES libraries – directors, working groups, sys admins, sub-committee members. <p>⇒ This marks the point in development wherein the development cycle should commence as follows:</p> <ol style="list-style-type: none"> 1. Help Desk tickets result in fixes or customizations. 2. Development spreadsheet results in customizations and/or new features. 3. Fixes, customizations, features developed by ESI or from within PINES. 4. All installed in testing environment for vetting first by PINES team and then by PINES libraries. 5. Once vetted, changes will be incorporated into current release or scheduled for upcoming release or upgrade.

WORKING GROUPS		<ul style="list-style-type: none"> • HOLDS Working Group will take issues remaining after Holds amnesty and replicate them in the testing environment; Issues will be prioritized and reported, either through the help desk or through the Software Development PM. • Acquisitions Working Group will be working in conjunction with Elaine Hardy on development of requirements document for new module. • Reports Working Group formed to work on development of templates, labeling improvements in current interface and development of a requirements document for a new and/or improved module. 	<ul style="list-style-type: none"> • Install Acquisitions module in Testing to aid development of Requirements Document being developed by Working Group.
SITE VISITS	<ul style="list-style-type: none"> • 01.26 & 01.27 - Chris Sharp, Katherine Gregory and Dawn Dale will conduct training and a site visit for Lee/Dougherty. • Mountain Regional visit scheduled. 	02.16 - Emily Almond & Chris Sharp, Mountain Regional Staff Day	