## General Comments
- Find balance between what really needs to be done locally and what can be effectively standardized or shared across campuses
- Benefits of more shared environment
  - provides a more consistent patron experience when using resources across campuses
  - scripts updates across campuses
  - aid in troubleshooting

## Modules

<table>
<thead>
<tr>
<th>Modules</th>
<th>Activity</th>
<th>What changes in a shared catalog with shared bib records:</th>
</tr>
</thead>
</table>
| Acquisitions/Serials | • Budget structures  
  • Vendor records  
  • Currencies  
  • Subscription records  
  • 853/853x pairs | • No changes; each campus does separately  
  • There is no sharing across campuses |
| Circulation     | Name of Sublibrary/Sublibraries                                         | • No changes                                                                                                           |
| Collection codes|                                                                          | • No changes; each campus does separately  
  • There is no sharing across campuses |
| Library hours   |                                                                          | • No changes; each campus does separately  
  • There is no sharing across campuses |
| Patron data and policies | • patron statuses  
  • patron categories  
  • load periods  
  • fines  
  • billing periods  
  • grace days  
  • renewals  
  • values for ids in patron records  
  • length of time to keep patron related records | • No changes; each campus does separately  
  • There is no sharing across campuses |
| Library fines/billing periods |                                                                          | • No changes; each campus does separately  
  • There is no sharing across campuses |
While no changes impact Acquisitions/Serials and Circulation, the following highlight what needs to be addressed within a shared catalog with a shared bib record.

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| Authentication     | 856 EZproxy configuration                     | • No changes; each campus does separately  
• Decision – need to ensure that campus specific 856 fields display clearly and correctly in the catalog |
| Authorities       | Local authority records                       | • Campuses can continue to input local authority records                                                                   |
|                   | Shared authority records                      | • All authority records will be shared                                                                                   |
| Authority record  | edits, updates, deletions                     | Policies needed – develop workflows for  
• Local additions  
• Edits/updates  
• Deletions  
• OWN field |
| Authorities -     | ongoing maintenance                          | Governance/management - determine who would  
• coordinate ongoing maintenance and upkeep  
• participate in ongoing maintenance and upkeep |
| Cataloging        | Local bibliographic records                   | • Campuses can continue to input local cataloging records for unique titles only                                         |
|                   | Shared bibliographic records                  | • All bibliographic records will be shared                                                                              |
| Adding bibliographic records | Policies needed – adding individual records (first time in database)  
• Original input  
• Download from WorldCat or other bibliographic utility |
| Bibliographic record edits, updates, deletions | Once individual BIBs are already in the database – develop workflows for adding  
• items  
• Holdings  
• Local holdings symbol to WorldCat  
• Editing  
• Added entries  
• Merges  
• Overlays |
<table>
<thead>
<tr>
<th>Vendor records – initial data loads</th>
<th>Policies – adding vendor records (first time in database)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Configuring batch loads correctly</td>
</tr>
<tr>
<td></td>
<td>• Configuring 856 fields, holdings and items correctly</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor records – ongoing</th>
<th>Once vendor records are already in the database (part 1) – develop workflow for creating the following for additional campuses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• New campus additions</td>
<td>• 856 fields on correct HOL record</td>
</tr>
<tr>
<td></td>
<td>• Items</td>
</tr>
<tr>
<td></td>
<td>• Holdings</td>
</tr>
<tr>
<td></td>
<td>• Local holdings symbol to WorldCat</td>
</tr>
<tr>
<td></td>
<td>• Mergers/overlays?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor records – ongoing</th>
<th>Once vendor BIBs are already in the database (part 2) – develop workflow for updating the following for campuses that already have them configured</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Updating campus holdings</td>
<td>• 856 fields</td>
</tr>
<tr>
<td></td>
<td>• Items</td>
</tr>
<tr>
<td></td>
<td>• Holdings</td>
</tr>
<tr>
<td></td>
<td>• Local holdings symbols on WorldCat</td>
</tr>
<tr>
<td></td>
<td>• Mergers/overlays?</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>Vendor records - maintenance</th>
<th>Vendor batch load policies</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Leave vendor records as they are</td>
</tr>
<tr>
<td></td>
<td>• Make sure all have fields to collocate</td>
</tr>
<tr>
<td></td>
<td>• 035 flipped to 035 8</td>
</tr>
<tr>
<td></td>
<td>• No document types – use 710 added entry</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>Bib records – ongoing maintenance</th>
<th>Governance/management - bib applies to all campuses; need decisions on who coordinates and/or arbitrates policies related to</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• individual records</td>
</tr>
<tr>
<td></td>
<td>• vendor batch loads</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deletions</th>
<th>Campuses can continue to have own local policies for deletions; and can continue to delete their own items and holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>• items</td>
<td></td>
</tr>
<tr>
<td>• holdings</td>
<td></td>
</tr>
<tr>
<td>Deletions</td>
<td>Policies needed for deletions of bib records; campuses would no longer be able to delete bib records without conforming to standards outlining criteria for when deleting bib records is acceptable</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>• bibs</td>
<td></td>
</tr>
<tr>
<td>Collection codes</td>
<td>Campuses can continue to have own collection code structure and text for codes</td>
</tr>
</tbody>
</table>
| Local notes | Policies needed – local notes  
• need to be put on HOL record  
• what can/cannot be added to bib records                                                                                                                                 |
| OWN Field | Define use of OWN field  
• Individual records  
• Vendor batch loads                                                                                                                                 |
| Document types | No longer use document types; use tab_type_config instead                                                                                                                                 |
| 856 fields - location | Decisions made on what to do with 856 fields. 856 is designated for HOL per MARC but is currently on BIB records; need to move to the correct HOL record then use expand back to the BIB. As examples:  
• Springer – all 856 are the same then add Ezproxy  
• Ebrary – all come with unique 856 – question on how to move to HOL?                                                                                                                                 |
| 856 fields - additions | 856 can be physically added by loader to either the BIB or HOL  
• if comes in on BIB then can expand to HOL  
• but, if comes in on HOL there is a problem expanding to the BIB?                                                                                                                                 |
| Merging catalog records | Investigate how to merge catalog records  
• CDL merge algorithm  
• Consult other consortia  
• create campus profiles based on responses to questions in cataloging survey                                                                                                                                 |
| Client | Configuration files | Investigate configuration for  
• shared 01  
• shared 60  
• sear_base |
| Holdings | • Sublibrary codes  
|          | • Collection codes  
|          | • Call numbers  
|          | • No changes; each campus does separately  
|          | • There is no sharing across campuses  
| Access   | Only to local campus holdings  
|          | • Investigate access restrictions based on permissions  
| Investigate | • Use of OWN field needed?  
|          | • Having all holdings records in one Oracle database  
| Services | Jobs running in the 50 library  
|          | • No changes; each campus does separately  
|          | • There is no sharing across campuses  
|          | Jobs running in the 01 library  
|          | Changes to jobs running in the 01 library – develop policies/workflow for _all_ jobs, such as  
|          | • retrievals (p_ret_01) to extract BIB records such as NNYLN  
|          | Jobs running in the 01 library - investigate  
|          | • need to add sublibrary as well as collection code (in 01 or all?)  
|          | • ability to create index to concatenate sublibrary and collection code in order to search on collection code such as JAMMNCIRC or JAMCACCIRC  
|          | Services in general, including jobs run in the 60 library  
|          | Need to revisit how campuses use Services and re-write workflow to make them more efficient  
|          | • Aleph canned reports  
|          | • Customized – where to add sublibrary information  
|          | • Develop “How To” for creating bibliographies  
|          | Services in general – revisit how these activities might be done in a shared environment  
|          | • Global changes on bibs  
|          | • How to deal with export/input of Oracle data  
|          | • Use of p_ret_01 to find text is inefficient  
|          | • P_ret_03/ccl searches – change/remove alternative way of searching  

SUNY Office of Library and Information Services  
Initially drafted November 2011  
Updated March 2013
| **Staff Permissions** | ADM, items, acquisition budgets, vendors, currency, serials, patrons | • No changes; each campus does separately  
• There is no sharing across campuses |
|----------------------|---------------------------------------------------------------------|------------------------------------------------------------------|
| Investigate          |                                                                     | • Need to define an OLIS Admin user  
• level of admin privileges to campus users need to create initial staff accounts  
• permissions for 01 |
| **WebOPAC**          | What is unique to a campus                                          | • local view with own campus logo  
• limit searches to records of one campus library |
|                      |                                                                     | • can remain unique to campus  
• or, standardize so there is a better understanding of what is searched across campuses |
|                      | Text for drop down menus                                           | • Each campus can have their own set of html  
• Or, minimize customization to provide patrons the benefit of seeing the same structure across campuses |
|                      | Local campus html                                                  | • Each campus would continue to have different bases  
• Campuses would keep specific database name |
|                      | What changes would result from a shared catalog                    | • Can have Union Catalog view  
• Can set up groups of campuses; regional or by sector, etc.  
• Can select another library for searching  
• Share index structure  
• Share a z39.50 port and server; would share everything but specific database name |
|                      | Use statistics                                                     | Need to review programs to address specific campus base; review what logs contain campus bases |
|                      | www_server ports – would they still be separate?                   | Need to check if everyone would share the same URL and port |