

Shared Catalog with Shared Bib Records Review

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

<i>Modules</i>	<i>Activity</i>	<i>What changes in a shared catalog with shared bib records:</i>
Acquisitions/Serials	<ul style="list-style-type: none"> • Budget structures • Vendor records • Currencies • Subscription records • 853/853x pairs 	<ul style="list-style-type: none"> • No changes; each campus does separately • There is no sharing across campuses
Circulation	Name of Sublibrary/ Sublibraries	<ul style="list-style-type: none"> • No changes
	Collection codes	<ul style="list-style-type: none"> • No changes; each campus does separately • There is no sharing across campuses
	Library hours	<ul style="list-style-type: none"> • No changes; each campus does separately • There is no sharing across campuses
	Patron data and policies <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • No changes; each campus does separately • There is no sharing across campuses
	Library fines/billing periods	<ul style="list-style-type: none"> • No changes; each campus does separately • There is no sharing across campuses

Shared Catalog with Shared Bib Records Review


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.

Modules	Activity	What changes in a shared catalog with shared bib records:
Authentication	856 EZproxy configuration	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Campuses can continue to input local authority records
	Shared authority records	<ul style="list-style-type: none"> • All authority records will be shared
	Authority record edits, updates, deletions	Policies needed – develop workflows for <ul style="list-style-type: none"> • Local additions • Edits/updates • Deletions • OWN field
	Authorities - ongoing maintenance	Governance/management - determine who would <ul style="list-style-type: none"> • coordinate ongoing maintenance and upkeep • participate in ongoing maintenance and upkeep
Cataloging	Local bibliographic records	<ul style="list-style-type: none"> • Campuses can continue to input local cataloging records for unique titles only
	Shared bibliographic records	<ul style="list-style-type: none"> • All bibliographic records will be shared
	Adding bibliographic records	Policies needed – adding individual records (first time in database) <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • items • Holdings • Local holdings symbol to WorldCat • Editing • Added entries • Merges • Overlays

Shared Catalog with Shared Bib Records Review

	Vendor records – initial data loads	<p>Policies – adding vendor records (first time in database)</p> <ul style="list-style-type: none"> • Configuring batch loads correctly • Configuring 856 fields, holdings and items correctly
	<p>Vendor records – ongoing</p> <ul style="list-style-type: none"> • New campus additions 	<p>Once vendor records are already in the database (part 1) – develop workflow for creating the following for additional campuses</p> <ul style="list-style-type: none"> • 856 fields on correct HOL record • Items • Holdings • Local holdings symbol to WorldCat • Mergers/overlays?
	<p>Vendor records – ongoing</p> <ul style="list-style-type: none"> • Updating campus holdings 	<p>Once vendor BIBs are already in the database (part 2) – develop workflow for updating the following for campuses that already have them configured</p> <ul style="list-style-type: none"> • 856 fields • Items • Holdings • Local holdings symbols on WorldCat • Mergers/overlays?
	Vendor records - maintenance	<p>Vendor batch load policies</p> <ul style="list-style-type: none"> • Leave vendor records as they are • Make sure all have fields to collocate • 035 flipped to 035 8 • No document types – use 710 added entry
	Bib records – ongoing maintenance	<p>Governance/management - bib applies to all campuses; need decisions on who coordinates and/or arbitrates policies related to</p> <ul style="list-style-type: none"> • individual records • vendor batch loads
	<p>Deletions</p> <ul style="list-style-type: none"> • items • holdings 	<p>Campuses can continue to have own local policies for deletions; and can continue to delete their own items and holdings</p>

Shared Catalog with Shared Bib Records Review

	<p>Deletions</p> <ul style="list-style-type: none"> • bibs 	<p>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</p>
	<p>Collection codes</p>	<p>Campuses can continue to have own collection code structure and text for codes</p>
	<p>Local notes</p>	<p>Policies needed – local notes</p> <ul style="list-style-type: none"> • need to be put on HOL record • what can/cannot be added to bib records
	<p>OWN Field</p>	<p>Define use of OWN field</p> <ul style="list-style-type: none"> • Individual records • Vendor batch loads
	<p>Document types</p>	<p>No longer use document types; use tab_type_config instead</p>
	<p>856 fields - location</p>	<p>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:</p> <ul style="list-style-type: none"> • Springer – all 856 are the same then add Ezproxy • Ebrary – all come with unique 856 – question on how to move to HOL?
	<p>856 fields - additions</p>	<p>856 can be physically added by loader to either the BIB or HOL</p> <ul style="list-style-type: none"> • if comes in on BIB then can expand to HOL • but, if comes in on HOL there is a problem expanding to the BIB?
	<p>Merging catalog records</p>	<p>Investigate how to merge catalog records</p> <ul style="list-style-type: none"> • CDL merge algorithm • Consult other consortia • create campus profiles based on responses to questions in cataloging survey
<p>Client</p>	<p>Configuration files</p>	<p>Investigate configuration for</p> <ul style="list-style-type: none"> • shared 01 • shared 60 • sear_base

Shared Catalog with Shared Bib Records Review

Holdings	<ul style="list-style-type: none"> • Sublibrary codes • Collection codes • Call numbers 	<ul style="list-style-type: none"> • No changes; each campus does separately • There is no sharing across campuses
	Access	<p>Only to local campus holdings</p> <ul style="list-style-type: none"> • Investigate access restrictions based on permissions
	Investigate	<ul style="list-style-type: none"> • Use of OWN field needed? • Having all holdings records in one Oracle database
Services	Jobs running in the 50 library	<ul style="list-style-type: none"> • No changes; each campus does separately • There is no sharing across campuses
	Jobs running in the 01 library	<p>Changes to jobs running in the 01 library – develop policies/workflow for <u>_all_</u> jobs, such as</p> <ul style="list-style-type: none"> • retrievals (p_ret_01) to extract BIB records such as NNYLN
	Jobs running in the 01 library - investigate	<ul style="list-style-type: none"> • 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	<p>Need to revisit how campuses use Services and re-write workflow to make them more efficient</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

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Staff Permissions	ADM, items, acquisition budgets, vendors, currency, serials, patrons	<ul style="list-style-type: none"> No changes; each campus does separately There is no sharing across campuses
	Investigate	<ul style="list-style-type: none"> Need to define an OLIS Admin user level of admin privileges to campus users need to create initial staff accounts permissions for O1
WebOPAC	What is unique to a campus	<ul style="list-style-type: none"> local view with own campus logo limit searches to records of one campus library
	Text for drop down menus	<ul style="list-style-type: none"> can remain unique to campus or, standardize so there is a better understanding of what is searched across campuses
	Local campus html	<ul style="list-style-type: none"> Each campus can have their own set of html Or, minimize customization to provide patrons the benefit of seeing the same structure across campuses
	Bases	<ul style="list-style-type: none"> Each campus would continue to have different bases Campuses would keep specific database name
	What changes would result from a shared catalog	<ul style="list-style-type: none"> 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