



Activities Status Update

Successful Activities to Date

- Server environment
 - Create dedicated servers environments
 - olsalf096 – replicate the current Aleph environment for the 12 POC campuses; would become the source data for the POC merge
 - olsalf098/olsodb098 – build the new shared environment; would become the target for the merged data process
 - Enabled associated functionality
 - Server user accounts
 - Firewall updates for ports
 - Installation of required utility programs
 - Installation of programming scripts needed for the merge
- Prep work on the 12 POC campus data on olsalf096
 - Moved local data from individual campus xxx01 library to xxx60 library
 - Established standard MARC tags for campuses that use Course Reserves in the xxx01 library and updated those records to conform
 - Added STA=Vendor to applicable xxx01 data so they could be identified and not be included in the record merge on olsalf098/olsodb098
 - Ran programs against each of the 12 POC campuses on olsalf096 to update staff permissions (GUI accounts) to make them unique by adding campus 3 letter code to each account
- Aleph configuration environment for olsalf098 – mostly completed
 - New for system admin files
 - New for SNY01 (shared bib records library)
 - New for SNY60 (shared holdings records library)
 - New for SNY50 (shared staff permissions and global patron records library)
 - New Aleph indexes in shared libraries
 - New for WebOPAC – SUNY-wide views and campus specific views
 - New GUI library.ini files to address shared sny01 and sny60 libraries while maintaining local campus configurations for xxx50 Admin and zzz30 Course Reserves libraries
- Creation of SNY60 – programs ran to
 - Create unique record numbers for campus holdings records

- Move 12 POC campus holding records to a shared Aleph library
- Update item record numbers in each POC campus xxx50 library to match correctly with campus holdings records in sny60
- Link 12 POC campus holding records in sny60 with associated records in the local campus xxx50 libraries
- Add campus “OWN” designation to associated holdings records in SNY60 (enables permissions to be set so that only the specific campus can edit their campus holding records)
- Acquired OCLC Master records to use as base records for the 12 campus POC merge
- Creation of SNY01 – programs ran to
 - Load the ~ 1.7 million OCLC master records associated with the 12 POC campuses
 - Load the 12 POC bib records from olsalp096
 - Link the 12 POC bib records in the SNY01 catalog to associated campus holding records in SNY60
 - Ran associated indexes
- Creation of SNY50
 - Shared Staff Permissions - ran programs to merge staff permissions from each of the 12 POC campuses into SNY50
 - Shared global patrons - ran programs to move the campus global patron records to a shared Aleph library
 - Ran associated indexes
- WebOPAC functionality
 - Having a different set of HTML and style for each campus is working
 - Patron empowerment for renewing loans and placing holds is working
 - Searching is working
 - Mobile catalog interfaces are working
 - Google Book displays
- X-Services
 - First test on POC bases was successful

Reviews/Testing Continuing

- Indexing – to address performance issues
- GUI configuration – needs of campuses; needs of OLIS
- Aleph services and reports
 - Ex Libris provided
 - SUNY created custom reports
- Staff permissions
 - Staff accounts can be created, changed, and work (while testing is underway)
- Anomalies in patron record data (z305 lacking campus prefixes and impact on display and possibly functionality)
- Common functionality
 - Creating holdings and items
 - Circulation; patron records
- WebOPAC
 - Display problem of Holdings and Items for all campuses displaying in the single campus view (possibly an expand or indexing issue)

- patron empowerment – waiting on two POC campuses to open their firewalls for LDAP testing
- z39.50
 - first test was unable to make a connection to the server on port 9991; might be a firewall issue and Val is checking on it
- Possible campuses changes required for URLs to specific titles/searches in Aleph

Has Not Been Addressed

- No testing with Sandbox
- Loadings sets of MARC records owned by one or a few campuses
- Discovery services extracts
- Campus specific extracts
- New Book Lists
- Downloading records from OCLC
- Loading PLIFs (patron records)
- Acquisitions/Serials
- Evaluation of workflows and how it will impact campuses

Origins of Shared Bib Project and POC Overview

Why a Shared Catalog/Single Bib

Following information was discussed at the SUNY Council of Library Directors (SCLD) Spring 2012 Business Meeting. The decision from SCLD is also included.

Locally in SUNY, there have been staffing decreases, most noticeably in Technical Services/Cataloging areas. Further, there has been a significant increase in campus acquisitions of subscription services to digital books. Vendors supply MARC records to enable access through local catalogs, in addition to providing retrieval through the vendor web-sites. The SUNY environment, where each campus has its own unique bibliographic database, results in the loading and maintenance of tens of thousands of duplicate records across multiple catalogs.

The consolidation of bibliographic databases and the introduction of the one bibliographic record per title would streamline maintenance and support of MARC records for these digital items. In addition, this change would make a *SUNYConnect*-wide discovery system a technically feasible option. And, as Chancellor Zimpher develops the concept of “systemness” to help shift administration cost savings to instruction, a shared catalog would:

- Create a union view that is accurate – as it represents the actual holdings of the campuses – this has significant implications for resource sharing and collection development across all formats;
- Would provide a more streamlined environment for shared cataloging operations among campuses;
- Streamline cataloging workflows – minimize going to a bibliographic utility for acquisition and/or cataloging records for general copy cataloging;
- Vendor batch loads - MARC records for e-resources subscriptions and Patron Driven Acquisitions (PDA) would be loaded and updated centrally;
- Possible cost savings by not having to download as many records from source bibliographic utility.

- Opportunity to investigate cost sharing of access to bibliographic utilities

Decision from SCLD Spring 2012 Business Meeting

- They would like to see SUNY more forward with a shared catalog/one bib record by 2014
- Endorsed by the University Colleges and Community College/College of Technology Sectors

This decision was re-affirmed at the SCLD Spring 2013 Business Meeting

One Bib/Shared Catalog Proof of Concept (POC) – Two Phases

- Phase 1
 - Identify 12 POC campuses
 - Create dedicated servers environments
 - olsalf096 – replicate the current Aleph environment for the 12 POC campuses; would become the source data for the POC merge
 - olsalf098/olsodb098 – build the new shared environment; would become the target for the merged data process
 - use a contained area to work out programming scripts and process
 - Based on the outcome of the merge activities associated with the 12 POC campuses, determine next steps as to the feasibility of proceeding to Phase 2
- Phase 2 – if undertaken
 - Merge all 57 campuses
 - olsalf002/olsalf004 – current DEV environments; would become the source data for Phase 2 of the POC merge
 - olsalf098/olsodb098; would become the target for the merged data process
 - determine changes needed in hardware, memory, storage
 - necessary to determine if POC can scale
 - stress testing
 - Based on the outcome of the merge activities associated with the 57 campuses, determine if it is feasible to establish a project to move the One Bib into production
- If the decision is made to go forward into Production, a new, separate project would need to be developed

**SUNYConnect Planning Considerations
Draft Timeline Update
October 20, 2014**

