# Appendix D: Model B Support

8/21/15 Melvyl Configuration and Electronic Resources Project Team

The team started a list of recommendations and tasks for supporting Model B. This is not a comprehensive checklist.

* One-time work:
  + Set up a liaisons group to manage campus accounts
  + Set up OCLC administrative accounts
  + Identify & activate databases
  + Draft new policies, best practices, and revise documentation
* Ongoing work:
  + Monthly activation of new resources
  + Periodic recruiting and managing liaisons
  + Campus liaisons work with their stakeholders on local customization decisions such as whether to subgroup databases by topic.
  + Troubleshooting problems (e.g., CDL to alert liaisons when they've accidentally turned on a database their campus doesn't license.)
* What are the types of customization decisions campuses could make? What do they need to consider? How do they need to document their decisions for end users or for support purposes?
* When do campus admins report problems to OCLC vs. the CDL Melvyl Operations Team?
* Recommendation to keep test instance in sync with production instance
* Recommendation: CDL sends monthly announcement of Central Index databases to campus contacts and indicates which databases CDL is activating.
* Managing communications: Create a Melvyl Central Index liaisons group. Could include more than one liaison at each campus, but access to OCLC administration module (service configuration) should be limited to one or two people at most.
* Share OCLC tutorial video on managing Central Index.
* Recommendation: keep the test instances in sync with the production instances for testing which means whatever Central Index resources are activated in the production instance should be activated in the test instance.
* How do campuses opt in or out? For example: If a campus participates for a year and then decides to stop (or stops maintaining their instance), what happens?
* Example of sets in search results: Ohio State has defined sets. They have 11 sets and 37 databases. Users can change which set is applied in the Advanced Search. The default set for OSU is what they have called “quick set”.
  + WCL – [http://osu.worldcat.org](http://osu.worldcat.org/)
  + WCD – <http://osu.on.worldcat.org/discovery>