

## June

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### Announcements

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## Jay Jordan Remains President and CEO of OCLC

*OCLC; edited*

The Minitex/OCLC Mailing went to press before we received an important announcement from Larry Alford, Chair, OCLC Board of Trustees. Please read below and disregard the article “New OCLC CEO” in the print version of the June *Minitex/OCLC Mailing*.

Dear OCLC Members,

The OCLC Board of Trustees has concluded that rather than moving forward with the appointment of Jack B. Blount as its President and CEO, it is in the best interest of OCLC to have Jay Jordan continue serving in these capacities. Mr. Jordan has agreed to postpone his retirement to continue leading OCLC.

The OCLC Board of Trustees believes Mr. Jordan’s strong track record, his skills as a leader, and his ability to identify and navigate emerging trends, make him uniquely qualified to serve the nearly 72,000 institutions that use OCLC services.

The Board of Trustees has complete confidence in the global management team and the 1,250 employees, who are working diligently to serve libraries around the world and fulfill OCLC’s mission and goals.

The Board is committed to an orderly transition of leadership and will be assessing its succession planning process as it moves forward. ■

### General

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## More Libraries Join OCLC WorldShare Management Services Community

*OCLC; edited*

Fifteen more libraries (including Crown College of St. Bonifacius, MN) have announced that they have selected OCLC WorldShare Management Services, the first cooperative, Webscale library management services that streamline cataloging, acquisitions, circulation, license management and workflows, and offer a next-generation discovery tool for



library users. This brings the number of libraries worldwide committed to using WorldShare Management Services to 210.

“UNCG believes that WorldShare Management Services are the next major advance in library cooperation,” said Tim Bucknall, Assistant Dean of University Libraries and Head of Electronic Resources and Information Technologies, University of North Carolina at Greensboro. “The services significantly reduce redundant and duplicative effort across libraries, thereby allowing each library to focus on their unique content and strengths.”

Among the new subscribers:

- Bay de Noc Community College, Escanaba, Michigan
- Criswell College, Wallace Library, Dallas, Texas
- Crown College, Watne Memorial Library, St. Bonifacius, Minnesota
- Dordt College, John and Louise Hulst Library, Sioux Center, Iowa
- Franklin Pierce University, Frank S. DiPietro Library, Rindge, New Hampshire
- Fuller Theological Seminary, David Allan Hubbard Library, Pasadena, California
- Huntingdon College, Houghton Memorial Library, Montgomery, Alabama
- Los Angeles County Museum of Art, Los Angeles, California
- Pasadena City College, Shatford Library, Pasadena, California
- Plymouth State University, Lamson Library, Plymouth, New Hampshire
- Santa Barbara City College, Luria Library, Santa Barbara, California
- Santa Clara County Law Library, San Jose, California
- Southeastern University, Steelman Library, Lakeland, Florida
- UCSF Medical Center at Mount Zion, H.M. Fishbon Memorial Library, San Francisco, California
- University of North Carolina at Greensboro (UNCG), Greensboro, North Carolina

OCLC WorldShare Management Services enable libraries to share infrastructure costs and resources, as well as collaborate in ways that free them from the restrictions of local hardware and software. Libraries using WorldShare Management Services find that they are able to reduce the time needed for traditional tasks and free staff time for higher-priority services.

OCLC WorldShare Management Services were released for general availability in the United States on July 1, 2011.

The OCLC WorldShare Platform is the technical infrastructure on which OCLC's Webscale services are built and provides data, tools and services for library developers, users and partners to create and share applications collectively. Libraries can build applications to meet local needs, while benefiting from the innovation of the broader global library community. ■

General

## Recently Published OCLC Research Reports

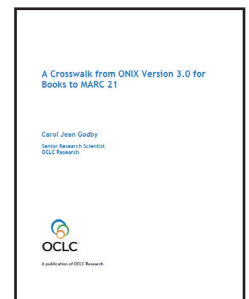
*OCLC; edited*

Two new OCLC Research reports will help librarians support researchers and interoperability in metadata standards.

### A Crosswalk from ONIX Version 3.0 for Books to MARC 21

This report describes the crosswalk developed at OCLC for mapping the bibliographic elements defined in Version 3.0 of ONIX for Books to MARC 21 with AACR2 encoding. It is an update to the previous report, *Mapping ONIX to MARC*, which was published in 2010 and focused on ONIX 2.1. The report can be found on OCLC's website here:

<http://www.oclc.org/research/publications/default.htm>



### Lasting Impact: Sustainability of Disciplinary Repositories

This report offers a quick environmental scan of the repository landscape and, then, focuses on disciplinary repositories—those subject-based, often researcher-initiated centers for research information. It is intended to help librarians support researchers in accessing and disseminating research information. The report can be

found here:

<http://www.oclc.org/research/publications/library/2012/2012-03r.htm> ■

Cataloging & Metadata

## Minitex Online RDA Forum Proposal and Survey

Mark K. Ehlert, Minitex/BATS

Many of you may know that the Library of Congress has set March 31, 2013, as the target date on which they will retire AACR2 and put RDA into practice full-time for their original cataloging. This move impacts not only their own library catalog and staff, but all other libraries that employ their bibliographic and authority records—a majority of institutions in this country, not to mention those beyond. When such sea changes occur, library staff band together to weather the transition; share ideas on implementation; discuss the impact on patrons, staff, and systems; spur creative approaches to resolving issues that arise.



To this end, the Minitex BATS unit seeks feedback on a proposal to organize a series of online forums addressing RDA and its effect on libraries in the Minitex region. We see these virtual town hall meetings as venues for catalogers and other library staff to interact with one another via presentations on topics particular to an individual institution, broader panel discussions, and open conversations among participants. Moreover, these forums may be recorded for the benefit of those unable to take part in the live sessions. The following link leads you to the survey that will inform our decisions on forum logistics, scheduling, and content.

<http://www.surveymonkey.com/s/mtxRDAforums>

This survey should take only a few minutes to complete. There are 7 questions with room for comments. We will keep the survey open until **Friday, July 13, 2012**, to allow enough time for responses. The results will be summarized in the July/August issue of the *Minitex/OCLC Mailing*. ■

Resource Sharing

## OCLC Policies Directory and WCRS Enhancements

OCLC; edited

OCLC has made several updates to the *OCLC Policies Directory* and to the WorldCat Resource Sharing service. The details can be found below.

### OCLC Policies Directory

OCLC has made several changes to the *OCLC Policies Directory* that expand search options and customize the number of days required to respond to interlibrary loan requests. A summary is below. See the announcement on the OCLC website for more information:

<http://z.umn.edu/822>

To effectively benefit from these and future enhancements, log in to the *Policies Directory* (<https://illpolicies.oclc.org>) and update your library's policies to:

- Indicate your library's lender fees (or lack of fees).
- Set the number of days your library needs to respond to requests (if more than 4).

### Search enhancements

Library staff can now search the *OCLC Policies Directory* by lender fees and currency. The search returns a list of institutions with policies that indicate a fee of less than or equal to the amount searched. A policy must contain lender fee information in order for it to be included in search results. Libraries with no lender fee value entered in their copy or loan policies will not be included in search results.

To make sure your library is included in lender fee searches: Log in to the *Policies Directory* and enter a value in this field. If you do not charge a fee, enter the value "0.00" to indicate no charge.

In August 2012, OCLC will enter a default value of 0.00 (zero) in the fee field for all libraries that have not yet entered this information. At this time, if you wish to represent a fee other than 0.00, you must update your *Policies Directory* profile with this information.

**Search**

**Institution Information**

Search By  
Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Days To Respond (0)

Rush Supported

International Lender (0)

Group Affiliation (0)

## MINITEX LIBR INFO NETWORK TRAINING (TQI)

Profile
Collections
Policies (7)
Schedule
Contacts

▼ Summary

<b>Name (Symbol):</b>	MINITEX LIBR INFO NETWORK TRAINING (TQI)
<b>Location:</b>	
<b>Shipping Address:</b>	<i>Not Defined</i>
<b>Institution Type:</b>	Library Networks or Processing Center
<b>OCLC Supplier:</b>	Yes <a href="#">Edit</a>
<b>Days To Respond:</b>	4 days <a href="#">Edit</a>
<b>Non-Circulating:</b>	All. TQI is a training symbol for the MINITEX Network. Please do not use for training purposes only. <a href="#">Edit</a>
<b>Periods:</b>	<b>Loan Period:</b> 3 Week(s) <b>Renew Period:</b> 3 Week(s)
	<b>Copies:</b> 0.05 USD <a href="#">More..</a> <b>Loans:</b> 0.00 USD <a href="#">More..</a>
	<b>Copies:</b> Email, OCLC ILL <b>Loans:</b> Email, OCLC ILL, Phone
	<b>Copies:</b> Ariel - FTP, Courier, Fax, Mail <b>Loans:</b> Courier, Mail

**Policy Information**

Fee  
0.00

Currency (1)

Select up to 10 types of currency:

- United States Dollar
- Afghan Afghani
- Albanian Lek
- Algerian Dinar
- Angolan Kwanza

[Deselect All](#)

*Enter lender fee and currency information*

### Set number of days to respond to requests

As part of our preparation for the new OCLC WorldShare Interlibrary Loan service, library staff can now indicate the number of days they require to respond to an ILL request. This new setting goes beyond the “Enter my symbol twice” option to enable setting this value to 4, 8, 12, 16 or 20 days.

▼ Summary

<b>Name (Symbol):</b>	MINITEX LIBR INFO NETWORK TRAINING (TQI)
<b>Location:</b>	
<b>Shipping Address:</b>	<i>Not Defined</i>
<b>Institution Type:</b>	Library Networks or Processing Center
<b>OCLC Supplier:</b>	Yes <a href="#">Edit</a>
<b>Days To Respond:</b>	4 days <a href="#">Edit</a>

With the release of this enhancement last May 20, OCLC set every library's default to 4 days. If you wish to change your response timeframe to 8, 12, 16 or 20 days, log in to the *Policies Directory* to make the change.

In addition, library staff may now search on the number of days needed to respond to a request. In the future, the new WorldShare Interlibrary Loan service will use the setting to display this information when library holdings are displayed.

## Resource Sharing Enhancements

OCLC has released a number of enhancements to the WorldCat Resource Sharing service, in response to user requests and in preparation for the upcoming transition to the new OCLC WorldShare Interlibrary Loan service.

### Link to WorldCat Resource Sharing news

A link to WorldCat Resource Sharing news is now included on all pages of the WorldCat Resource Sharing service. This gives you easy access to information about recent and upcoming enhancements to the service as well as announcements of upcoming webinars.

### Deflection by ILL license terms

OCLC libraries that have loaded their e-content holdings into the WorldCat knowledge base and activated the link to WorldCat Resource Sharing can now deflect lending requests for items with ILL license terms that do not allow loans.

### "Future Date" option discontinued

In preparation for functionality within the new OCLC WorldShare Interlibrary Loan service, we have removed the "Future Date" option from WorldCat Resource Sharing. Lenders may continue to respond with "Yes," "No" or "Conditional."

### Electronic Delivery Options settings in WorldCat Services administrative module

A new option in the Electronic Delivery Options section of the WorldCat Services administrative module enables library staff to indicate methods other than Ariel, Odyssey, Skype, Yahoo! Messenger and Windows Live Messenger through which they wish to receive electronic files. The new "Other" entry can be used for additional electronic delivery methods such as OCLC's new Article Exchange document-sharing site.

### New "Lost" status

You can now update ILL requests in the categories "Overdue," "Renewal," or "Recalled" to a problem status of "Lost."

### Increased number of Direct Request book records retrieved for ISBN search

Direct Request for books will now search and select the appropriate bibliographic record from up to 25 records returned on the ISBN search. The previous limit was five records. This should improve the number of Direct Requests for books that are actually processed by the service.

### Addition to "Reason for No" monthly report for Conditional responses

When a borrowing library cancels a request in a Conditional status, the "Reason for No" monthly report will provide the text, "Cancelled by Borrower."

### E-mail from anywhere via ISO ILL

Libraries that are configured as ISO ILL can now e-mail ILL requests from any status in the interlibrary loan process.

### Web services updates

OCLC has updated the Web services used by our partners to communicate with WorldCat Resource Sharing. These partners include CLIO, RapidILL, Relais and others. The version 1.6 Web service supports all of the changes made to WorldCat Resource Sharing outlined above. OCLC has also updated the Web service used by our partner, Atlas Systems, the developers of ILLiad.

### Enhancements to Article Exchange document sharing site

E-mails generated when a lender launches Article Exchange from a *Pending* or *In Process* request now include citation data from the ILL request. In addition, the email now includes the OCLC ILL transaction number and ILLiad transaction number. The addition of citation data and transaction numbers to Article Exchange e-mails will help staff at lending libraries track the status of these requests.

Files uploaded to Article Exchange will now be deleted after five views or 30 days without viewing. This replaces the previous deletion five days after the first view. ■

Article Exchange now supports the ZIP file extension in addition to the file formats previously supported: BMP, GIF, J2K, JFI, JFIF, JIF, JP2, JPE, JPEG, JPEG 2000, JPF, JPG, JPM, JPX, MDI, MJ2, PEG/JFIF, PDF, PNG, PSD, TGA, TIF, TIFF, TPIC and WEBP.

Additional information about Article Exchange is available at:

<http://www.oclc.org/us/en/resourcesharing/features/articleexchange/default.htm> ■

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## Digitization & Preservation

### New Minitex Preservation Listserv

Minitex, in collaboration with the University of Minnesota Libraries Twin-Cities Campus, is introducing a new e-mail list dedicated to discussions and announcements related to preservation. The list, *Minitex Preservation Forum*, is open to all library staff and other interested parties in the Minitex region. Those outside the region may also participate.

The list is meant to provide a regional forum for subscribers to discuss both practical and theoretical matters concerning the preservation of print, audiovisual, and digital resources. Topics might include, but are not limited to:

- Announcements for regional and national grant opportunities
- Announcements for continuing education opportunities
- Preserving digitized and born-digital content
- Digitization for preservation
- Collections emergency planning and preparedness
- Preventative preservation of print and audiovisual materials (best practices for care and handling, environmental monitoring, and storage and housing)
- Physical treatment of special and circulating collections
- Preservation outreach

To subscribe, point your browser to the following website and fill out the form in the middle of the page:

<http://lists.minitex.umn.edu/mailman/listinfo/mtx-preservation>

On the same page, you will find a link to the archives as well as a form near the bottom that will give you access to password, subscription, and message delivery options. This e-mail list functions like many others you may be familiar with:

- Subject lines for all messages that show up on the list will automatically include the prefix [mtx-pre]
- Responses to posts are directed to the list by default
- Text may be formatted for display, e.g., bold typeface, underlining
- Attachments can be applied to messages. But be careful when passing along large files; some local e-mail systems may balk at receiving a multi-megabyte attachment

In the spirit of Minitex's collaborative history, we look forward to an active and engaged community assisting one another in preserving information resources and cultural heritage materials.

Mary Miller, University of Minnesota Libraries and Kate Brownrigg, Minitex are contributing authors. ■

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## Digitization & Preservation

### CONTENTdm Online Courses Scheduled

*Sara Ring, Minitex/BATS*

As part of our training partnership with OCLC, Minitex offers quarterly 3 CONTENTdm Basic Skills webinars. They include:

- Getting Started with CONTENTdm
- Working with Text in CONTENTdm
- Maintaining Collections in CONTENTdm

All three have been scheduled for August, 2012. Courses fill up fast, so if you need CONTENTdm training, make sure to register soon! Visit the Minitex training webpage to browse upcoming training sessions:

<http://www.minitex.umn.edu/Training>

Other OCLC training partners offer the Basic Skills CONTENTdm webinar series as well. Visit the OCLC Training Portal to view the full schedule (choose "CONTENTdm" under the Digital Collection Management heading):

<http://training.oclc.org/training> ■

## Minitex/OCLC Mailing Contact Information

Minitex Bibliographic and Technical Services (BATS)  
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Minitex Contract Cataloging Program (ConCats)  
612-624-4002, 800-462-5348, [ConCats@umn.edu](mailto:ConCats@umn.edu)  
Mark Ehlert

Minitex Cooperative Purchasing & Electronic Resources Services (CPERS)  
Rita Baladad 612-626-8252, [balad001@umn.edu](mailto:balad001@umn.edu)  
*OCLC Reference products and services*

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Minitex is a publicly supported network of academic, public, state government, and special libraries working cooperatively to provide and improve library service to patrons in Minnesota, North Dakota, and South Dakota.

For address and name changes, please send a message to [mino@umn.edu](mailto:mino@umn.edu).

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*An Information and Resource  
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of Minnesota Libraries*

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**JUNE 2012**

**MINITEX/OCLC MAILING**

A Publication of the Minitex Bibliographic and Technical Services Unit



# MINITEX CALENDAR

This calendar primarily lists events scheduled by Minitex, although other events are included. This is an informational posting only, registration materials are sent

separately. If you would like your event included in the calendar, please call Kay Kirscht at 612-624-3532.

## JULY

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**10**

CatExpress

1:00 p.m. – 2:30 p.m., CST

*OCLC Online Training Session*

<http://www.minitex.umn.edu/Training/Details.aspx?SessionID=244>

**12**

Connexion Client, Module 2: Basic Bibliographic Searching

1:00 p.m. – 3:00 p.m., CST

*OCLC Online Training Session*

<http://www.minitex.umn.edu/Training/Details.aspx?SessionID=387>

## AUGUST

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**1**

CONTENTdm Basic Skills 1: Getting Started

1:00 p.m. – 3:00 p.m., CST

*OCLC Online Training Session*

<http://www.minitex.umn.edu/Training/Details.aspx?SessionID=389>

**2**

CatExpress

1:00 p.m. – 2:30 p.m., CST

*OCLC Online Training Session*

<http://www.minitex.umn.edu/Training/Details.aspx?SessionID=244>

**3**

CONTENTdm Basic Skills 2: Working with Text

1:00 p.m. – 3:00 p.m., CST

*OCLC Online Training Session*

<http://www.minitex.umn.edu/Training/Details.aspx?SessionID=390>

**6**

CONTENTdm Basic Skills 3: Maintaining Collections

1:00 p.m. – 3:00 p.m., CST

*OCLC Online Training Session*

<http://www.minitex.umn.edu/Training/Details.aspx?SessionID=391>

**9**

Connexion Client, Module 2: Basic Bibliographic Searching

1:00 p.m. – 3:00 p.m., CST

*OCLC Online Training Session*

<http://www.minitex.umn.edu/Training/Details.aspx?SessionID=387>