

ANNOUNCEMENTS

A New OCLC Service: WorldCat Collection Analysis

The new WorldCat Collection Analysis service is now available to help you quickly analyze your individual and group library collections. Now, libraries with subscriptions to WorldCat on FirstSearch can compare their collections with thousands of peer institutions that have their holdings in WorldCat. Using the new service, library staff can analyze their collections anytime, without extensive staff, time or financial resources.

The service provides many benefits to libraries, including:

- **Comparison with peer libraries**—easily identify strengths, gaps and overlaps in your collection
- **Multiple views of the collection**—choose from many parameters, including subject, publication date, language, format and audience level, to create views to meet your needs
- **Participate in consortia activities**—groups can analyze member collections for more effective collaborative collection development
- **Support library processes**—analysis results facilitate acquiring, weeding, canceling and preserving processes
- **Demonstrate fiscal responsibility**—reports can be used to prove financial need and responsible stewardship to administrators and funding bodies

Features include:

- The ability to compare your collection with thousands of institutions that have their holdings in WorldCat
- Any collection can be analyzed regardless of the type of materials, classification scheme, library, or the integrated library system used
- Browser interface that's easy to use from within the staff view of FirstSearch
- Affordable annual subscription, for predictable pricing
- Reports can be easily exported to other programs like Microsoft Excel

Requirements:

- Current generation Web browser
- Subscription to the WorldCat database on FirstSearch

For more information, contact MINITEX BATS (see contact information at the end of this *Mailing*.) Or visit the OCLC Website at:

<http://www.oclc.org/collectionanalysis/>

Important Message for NACO Participants: Authorities Migration Timeline

All NACO activity must be done via Connexion (either the browser or the client) as of May 1, 2005. This means that neither Passport nor CatME NACO activity will be supported as of May 1.

Please read the following message from Becky Dean, OCLC:

As many of you are already aware, support for Passport for cataloging functionality ends May 1. The next major phase of OCLC's migration involves moving all NACO processes to Connexion. This phase of the migration follows the implementation of the Review Process, available in the Connexion Browser and Client applications. OCLC is working with the Library of Congress to ensure the changes will not result in any changes to the formatting of OCLC authority records, nor result in any disruptions to the NACO project.

Of paramount importance: Effective May 1, any remaining authority records that are in an institution's save file will be permanently lost (locks will be removed, edits will be lost, etc.). OCLC staff will not be able to retrieve any lost data.

Because authority records that are currently in the Passport or CatME save file cannot be moved into Connexion, it is imperative that appropriate action be taken to clean out all authority records that reside in an institution's save file.

As a result of these changes, on May 1, 2005, the following processes will be permanently disabled in Passport and/or CatME:

- The ability to access the online authority save file via Passport users,
- The ability to add new authority records via Passport and/or CatME,
- The ability to replace authority records via Passport and/or CatME,
- The ability to access submitted/responded records via Passport and/or CatME,
- The ability to search or browse the OCLC authority file using Passport,
- The ability to export authority records using Passport

Important clarification for CatME users:

OCLC will discontinue support for NACO functionality in CatME on May 1 -- this is a change from previous announcements. Because the NACO functionality in CatME is closely tied to Passport, it became necessary that the NACO processes for Passport and CatME be dismantled on the same date.

CatME users **will** be able to continue to search, edit, and export authority records until July 1.

If you have not yet already done so, please move all your NACO activities to Connexion by May 1. For additional information on migrating to Connexion, see:

<http://www.oclc.org/connexion/migrating/>

Becky Dean, OCLC

Migration Countdown

As of March 15, 2005, there are only:

- 1.5 months until the demise of Passport for Cataloging and Passport for ILL on May 1, 2005.
- 3.5 months until the demise of CatME on July 1, 2005.
- 5 or 6 months until the demise of Passport for Union Listing in August or September, 2005.

CATALOGING & METADATA

OCLC Connexion Client: A New Version with Lots of Enhancements!

By the time you read this article, version 1.30 of the OCLC Connexion Client will either already be here, or will be just around the corner. It will, for sure, be released by the end of March. Version 1.30 contains lots of great new features, plus it fixes many of the problems encountered with version 1.20. Read on!

Searching Enhancements

The WorldCat searching enhancements are extensive, and in many cases, change the way you construct a search. These are the same enhancements that were added to the Connexion Browser in Nov. 2004.

- Search WorldCat via a simplified dialog that includes search areas for Command Line and Keyword/Numeric searches.
- Search WorldCat using "true" keyword searching. Use Boolean operators "and", "or" and "not. Enter multiple terms with a single index label.
- Browse WorldCat using several new browse indexes, including Corporate/Conference Name, Personal Name, Subject, Title, and more.

- Select from over 90 indexes for searching and 50 indexes for browsing. For more information on the indexing changes, see *Technical Bulletin 251, Connexion WorldCat Searching* <http://www.oclc.org/support/documentation/worldcat/tb/251/default.htm>.

This is important! This Technical Bulletin describes the search syntax changes for keyword and phrase searches. Also, there are new indexes for whole phrase searches.

NOTE: The Searching WorldCat tutorial (at <http://www.oclc.org/support/training/connexion/client/tutorial/default.htm>) will soon be updated to include these enhancements.

- View truncated lists for searches that result in 6-100 matches, similar to Passport and CatME. Data and default sort order in truncated lists vary depending on the type of search. You can re-sort truncated lists by clicking any column heading. Truncated list types include author (for various derived and keyword author searches), title (for derived title and keyword title and series searches), government document number (for govdoc searches), publisher number (for music publisher number searches), and main entry (for the remaining keyword and numeric searches).
- Specify how WorldCat search results are displayed. Options include system default (based on the number of records retrieved), truncated list, brief list, or full record. Toggle between displaying results as truncated and brief list types.
- View total number of holdings on entries in the brief list.
- Review the search you used in the window border of a list of results.

CJK and Arabic Script Cataloging (some highlights)

- Catalog using Chinese, Japanese, and Korean (CJK) scripts and Arabic script.
- Search WorldCat using new keyword indexing of the CJK and Arabic script data. All WorldCat keyword indexes include Latin, CJK, and Arabic script data.
- View CJK and Arabic script data in WorldCat records with no special client software installation required. All Connexion client users with version 1.30 and higher see all data using the same software.
- Create records containing romanized data only (Latin script representation of CJK or Arabic script), CJK or Arabic script data only, or both.
- View on-screen designation of linked romanized and non-Latin script data fields. Manually link and unlink pairs of roman and script fields.
- Choose from four options for exporting records to your local system.
- For more information, go to: <http://www.oclc.org/connexion/interface/client/enhancements/future.htm>

Spanish Interface

- Use a Spanish client interface, similar to the CatME Spanish interface.
- Both the English and Spanish interfaces are available in a single version of the client, so you can easily change between English and Spanish.
- You receive a prompt to select the language you want to use for the interface the first time you start the software after installing or upgrading.

Miscellaneous Enhancements (some highlights)

- The same font size setting you use for displaying records also determines the font size of text you enter in search dialogs.
- More easily select multiple records on local file lists by dragging the mouse pointer through the entries you want to select.
- Search the bibliographic local file by a new Date index and view dates in the new Date column on the local file list.
- Search bibliographic and authority local files by "not set" action statuses to retrieve records that are not marked ready, completed, or failed. For example, export not set, update holdings not set, and validate not set.
- When batch processing, select a new option to retain your selection of local files so the same file(s) are automatically selected each time the batch processing dialog is opened.
- View batch report data in the order the transactions were processed. Also, in the batch action report, view new control numbers for new records successfully added to WorldCat and the Authority File.
- Resolutions to many reported problems in version 1.20 as listed in the Known Problems document http://www.oclc.org/connexion/support/client_known_problems.htm#1_20
- For more information, go to:
<http://www.oclc.org/connexion/interface/client/enhancements/future.htm>

Downloading the Client

Are you downloading the Client for the first time? Please see the Getting Started document at:
<http://www.oclc.org/support/documentation/connexion/client/gettingstarted/>

Read it carefully!

Upgrading from Version 1.20 to 1.30

If you already have version 1.20 installed, here are some tips for upgrading to version 1.30.

- OCLC recommends that users uninstall the previous version of the client before upgrading to give a cleaner installation. When uninstalling, all of the settings and local files are retained. Uninstall using Add/Remove Programs from the Control Panel. If there are multiple entries for OCLC Connexion client in the list, remove each occurrence. (However, uninstalling is not required. When upgrading from 1.20 to 1.30, all settings transfer to the new version.)
- Client 1.30 includes a new "Date" index and column in the bibliographic local save file. Records saved with client 1.20 must be re-saved to be included in this index. Users can either display and re-save records individually or copy/move records to a new local file to include then in this index.
- Client 1.20 will continue to work until June 1, 2005. Beginning June 1, client 1.20 users will receive an error when they try to log on.

For more information about upgrading from 1.20 to 1.30, see the "Update the Connexion Client" section of the Getting Started document:

<http://www.oclc.org/support/documentation/connexion/client/gettingstarted/>

OCLC Connexion Browser: Changes to Recommended Browser Settings

In response to questions from member librarians, OCLC has updated the browser options recommendations for OCLC Connexion (**the browser interface only**). The new guidelines, which cover cache settings, cookies, and security options, are more compatible with other OCLC and non-OCLC web interfaces.

The recommendations are available from the System Requirements link from the Connexion logon page, the Help system from within Connexion, or directly at:

http://connexion.oclc.org/html/corc/help/en/gc_login_sysreq_hardware_software.html.

The new section "Resolve caching problems" recommends that you set your browser to refresh pages every time you visit a page. Using the settings given in this section slows performance but can improve reliability when a workstation has a cache problem that causes the browser to display expired pages or incorrect data.

These new recommended settings are compatible with OCLC FirstSearch, NetLibrary, and QuestionPoint. These compatible settings are more reliable with certain local network configurations, but may cause slightly slower performance than the settings in the section labeled "Cache settings for best performance".

Recommendations in the added section, "Resolve caching problems" are as follows:

Internet Explorer

1. On the Tools menu click Internet Options.
2. On the General tab, under Temporary Internet Files, click the Settings button.

3. In the Settings dialog box, under Check for newer versions of stored pages, click Every visit to the page.
4. Then click OK to close the Settings dialog box.
5. On the General tab, under Temporary Internet Files, click the Delete Files button. In the Delete Files dialog box, select the Delete All Offline Content button. Then click OK.
6. On the Advanced tab, under Security (the last group of settings in the list), select the check box labeled Empty Temporary Internet Files folder when browser is closed.
7. Click OK to close the Internet Options dialog box.

Netscape browsers

1. On the Edit menu, click Preferences.
2. In the left pane of the Preferences dialog box, under Advanced, click Cache.
3. In the right pane (the Cache panel), under Compare the page in the cache to the page on the network, select Every time I visit the page.
4. At the top of the Cache panel, click the Clear Cache button.
5. Then click OK to apply the change and close the dialog box.

If you need assistance in setting browser options for use with OCLC web interfaces, please contact MINITEX BATS (see contact information at the end of this *Mailing*).

Chris Grabenstatter, OCLC; edited

MINITEX CONTRACT CATALOGING

Foreign Language Cataloging

The MINITEX Contract Cataloging Program (the ConCats) recently completed several projects involving materials in some of the lesser-known languages. These projects included materials in Amharic, Arabic, Chinese, Hebrew, Japanese, and Somali. Working with native speakers at the University of Minnesota, the ConCats were able to produce cataloging records with accurate transcriptions (although in romanized form), together with accurate subject access.

Language expertise is also available in other languages. Many libraries lack access to persons who can read a particular language, either among staff members or in the community. If you have foreign language materials that are not being cataloged because of this, please contact the ConCats to see how we might help you. You can get in touch with us at ConCats@tc.umn.edu.

Edward Swanson, MINITEX Contract Cataloging

RESOURCE SHARING

WorldCat Resource Sharing Enhancement Timeline

On **April 17, 2005**, OCLC plans to add the following enhancements to the WorldCat Resource Sharing staff view:

- Derived Searching
 - Available in Expert Search
 - Slash qualifiers for format, date, microform, cataloging source & Internet resources
 - Recognizes OCLC number searches with # or * as the first character
 - Recognizes derived searches without an index label
- Batch Updating
 - Wand in or type request barcodes
 - Apply constant data and /or conditional notes
 - Submit once and receive feedback
 - Activity completed
 - Error details
 - Counts for number updated
- Additional Options for Batch Printing
 - Ability to print 1 and 2 requests per page
 - Ability to print all newly "shipped" requests
 - Ability to print mailing labels: comma delimited output file & templates
 - Automatic move to "in process" on batch printing of pending requests

Later enhancements: planned for sometime after June, 2005

- Auto-pick of lender string based on LDR data
 - Your requests will be sent only to those libraries that have the year you are seeking, based on local holdings in WorldCat.
- Lender filters and increased lender string
 - You'll no longer see requests that you can't or don't fill, based on information you've entered in the OCLC Policies Directory.
 - The lender string will be increased to 10 in order to prevent or decrease the need to create "new" requests from "unfilled" requests.
- Load leveling of requests among libraries and groups
- Email notifications automatically triggered by request status
- Real-time supplier status control
 - Control supplier status via the OCLC Policies Directory so that requests do not sit idle when a library is closed.

- Non-suppliers in existing lender strings will be skipped so that the request can move on to a lender that is available to fill the request.
- Patron view for libraries with no FirstSearch account
- Control of resource sharing administrative functions from within the Staff View (rather than the Admin Module)

In addition to the planned enhancements listed above, OCLC will also fix bugs in the interface around the middle of each month. These bug fixes are currently planned for March 20, April 17, and May 15.

Watch the OCLC Resource Sharing Migration Website for further information and updates:
<http://www.oclc.org/ill/migration/default.htm>

OCLC ILL Subscription Pricing (also known as Subscription Resource Sharing Pricing)

Does your library use OCLC ILL? If so, have you moved to subscription pricing yet? Take note: **Subscription pricing is the only pricing option for OCLC ILL after June 30, 2005.** As of July 1, 2005, transaction-based pricing for OCLC ILL will no longer be available.

Subscription resource sharing pricing provides unlimited access to OCLC ILL, ILL Fee Management, Statistics, and online Union Listing activity.

In February, MINITEX mailed final subscription quotes to the OCLC ILL contacts of each library that had not already moved to subscription pricing. You may switch to subscription pricing anytime between now and July 1, 2005. Just fill out the online order form and specify your start date (see your quote letter for specifics). If you have not switched to subscription pricing by July 1, OCLC will move you to subscription pricing automatically on that date.

If you did not receive a quote and believe you should have, please contact the MINITEX BATS unit (see contact information at the end of this *Mailing*). There are several reasons why your library might not have received a quote:

- The quote letter was sent to the wrong person. This can be remedied by providing us with the contact information for the correct person, and we will send out a quote right away.
- Your library uses a shared dedicated TCP/IP line. Carla Dewey Urban is working individually with each of these libraries in order to generate a correct quote.
- Your library had no OCLC activity during calendar year 2004. Since there was no activity on which to base a quote, MINITEX will work with these libraries individually to generate a quote.

- Your library has never used OCLC ILL, but you want to start using it. Contact MINITEX BATS and we will work with you to generate a price quote. Then we'll help you get started using WorldCat Resource Sharing.

Virginia Dudley, MINITEX BATS

REFERENCE

FirstSearch Admin Module Enhancements

The FirstSearch Administrative Module is being updated on March 20, 2005. The enhancement will change how users navigate from screen to screen in order to make better use of the space available in the interface.

The second layer of navigation tabs is being replaced with navigation options and drop down lists along the left side of the screen.

The screen names and locations of individual functionality controls are not changing. Users will continue to find controls on the same screens that they have been on in the past. The navigation path will be included at the top of each screen along with the screen name.

OCLC's Bits and Pieces, 2/10/2005

DIGITIZATION & PRESERVATION

Central Registry for Digital Materials

The DLF/OCLC Registry of Digital Masters now provides a central place for library staff to search for, and find, digitally preserved materials.

As such, the Registry broadens access to your organization's publicly-available digital books and journals. The Digital Library Federation (DLF) (<http://www.diglib.org/>) and OCLC developed the Registry, which functions as a subset of WorldCat.

To be included in the Registry, an item must be available in a digital format. Typical items include monographs and serials. A registered object ensures that the digital object (or soon to be

digitized object) follows established standards and best practices for digitization and that the institution that digitized it has made a commitment to digital preservation of this object.

Benefits of the Registry

Adding records to the Registry of Digital Masters provides:

- Easier access to digital or to-be-digitized materials for staff
- The ability to find digital materials that are available elsewhere
- Assurance that there may be no need to digitize certain materials. (If they are already in the Registry, you save resources and can direct your efforts to other materials.)
- Original credits for new records (or database enrichment credits for updates)

The Registry of Digital Masters also provides information about:

- Digital or to-be-digitized materials
- The level at which materials have been digitized - Is it adequate enough that another digital copy is not required?
- The institution responsible for the digitization

Guidelines for best practices

The Registry of Digital Masters is a joint DLF/OCLC venture. Members of both the DLF and OCLC are helping to establish best practices. Based on DLF functional requirements for both digitally reformatted and born-digital materials, guidelines for creating or editing records are available, providing Registry elements mapped to MARC 21 elements. Also provided are: a few examples, a glossary and a "cheat sheet" of minimal requirements needed to create a Registry record.

Learn more about the guidelines and how to get involved:

<http://www.oclc.org/digitalpreservation/why/digitalregistry/getinvolved/default.htm>

Learn more about the development of the Registry of Digital Masters:

<http://www.diglib.org/collections/reg/reg.htm>

How to find Registry records

Search WorldCat (using either FirstSearch or Connexion) to find digital items in the DLF/OCLC Registry. Registry metadata in the WorldCat record will tell you:

- That a preservation master exists
- That a use copy is available and accessible
- Which institution digitized or intends to digitize it
- The level at which the material has been digitized
- The technical standards applied to the digitization process

To search for Registry records:

- In FirstSearch, enter ac=dlr as a keyword search.

- In Connexion, enter ac=dlr in the Command line -OR- use dlr as a keyword and choose Authentication code (ac) from the drop-down index list.
Note: Until version 1.30 of the Connexion Client is available in late March, this search can only be done in the Connexion Browser.

In the MARC records, you will find the value dlr in the 042 field (Authentication code). In *Bibliographic formats and standards*, value dlr is described as follows:

Digital Library Registry. Record is created according to the best practice guidelines developed by the Digital Library Federation for a registry of digitally reformatted and born digital monographs and serials.

Before beginning

Before beginning work with the Registry of Digital Masters, decisions should be made about the standards used to digitize materials. To find out more about the Registry and how to get started, go to:

<http://www.oclc.org/digitalpreservation/why/digitalregistry/default.htm>

OCLC's *Bits and Pieces*, 2/11/2005; edited; Virginia Dudley, MINITEX

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