

## COLLECTIONS & TECHNICAL SERVICES

### Connexion Browser: Exporting Tip

This tip is for OCLC Connexion browser users who export bibliographic records to files on their local workstation using browser export. This tip will help users identify, retrieve, and export batches of records more efficiently and quickly from the online save file for export to the local workstation. All users who currently export a single record at a time with browser export should consider this tip.

The Connexion browser has a feature that allows you to set action statuses for export. After editing a bibliographic record, mark the record for export by selecting the "Mark for Export" action or using the keystroke shortcut <Alt-K><J>. The record will be marked with an action status of "R", or Ready for Export. Then save the record to the bibliographic save file using the command "Save Record" under the action drop down menu, or <Alt-K><S> as the keystroke shortcut. At the end of your session, when you have finished editing, marking and saving all your records to the bibliographic save file, you can retrieve only those records marked "Ready for Export" by searching Action Status/Export-Ready. You can then flag, export and save your records, up to a maximum of 100 per batch, to a file on your local workstation.

The action status for all records successfully exported will change to "C", or Completed. You will be prompted for a filename for each group of records that you export. Remember to give each exported file a unique file name. File export on the Connexion browser will not append to a file.

More extensive information on Connexion browser export can be found in the Connexion browser help files, or the Connexion browser documentation available at:

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

If you have further questions or need assistance with OCLC Connexion, please contact the MINITEX Bibliographic and Technical Services Unit (800-462-5342, 612-624-4002, [mino@othello.minitex.umn.edu](mailto:mino@othello.minitex.umn.edu)).

[OCLC Website, 4/26/2004]

### New Sets Available in OCLC WorldCat Collection Sets

Collection Sets offers pre-cataloged sets of electronic and microform records. Seven new sets are available.

- American Literary Annuals and Gift Books, 1825-1865, a microfilm set cataloged by University of Rochester Library.
- Black Drama: 1850 to Present, an electronic set cataloged by University of California, San Diego Library.
- JSTOR Arts & Sciences III Collection, an electronic set cataloged by University of Michigan Library.
- JSTOR Arts & Sciences IV Collection, an electronic set cataloged by University of Michigan Library.
- LLMC Digital, an electronic set cataloged by St. Louis University Law Library.
- Safari Tech Books Online, an electronic set cataloged by OCLC.
- SPIE Digital Library, an electronic set cataloged by University of California, San Diego Library.

Collection Sets offers economical, pre-cataloged sets of electronic and microform records. By purchasing groups of existing records you increase user access to these collections and save time and money. For a complete listing of available record sets and additional information please go to OCLC's WorldCat Collection Sets web site at:

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

[OCLC Website, 4/23/2004]

## RESOURCE SHARING

### **Frequently Asked Questions about the Integration of OCLC ILL into FirstSearch**

**Q:** Why is OCLC integrating OCLC ILL into the FirstSearch service? What will be included in the new resource sharing service?

**A:** Integration of OCLC ILL into the FirstSearch service will allow ILL staff to take advantage of many features available in FirstSearch that are not currently available through OCLC ILL. These include:

- Improved searching for materials
- Local fulfillment options will be more visible
- Links to local catalogs

- Improved access to serials holdings statements
- Descriptive content including cover art, excerpts and links to reviews

In the longer term, reducing the number of interfaces will help OCLC reduce costs.

In addition to these features, staff will also be able to take advantage of new functionality that will be introduced through the FirstSearch staff view:

- Provide local call number and shelf status (through Z39.50) on lending requests
- Integrate circulation (NISO Circulation Interchange Protocol), e-content, and ILL into a single workflow
- Integrate ILL policy information to deflect unfillable requests, increase fill rates, and reduce turnaround time.
- Apply library processing options; for example, handling requests differently if they come from faculty versus student populations or recognizing lending relationships between libraries
- Support group processing; for example, routing requests through group members before sending them to libraries outside the group
- Enable patrons to not only place requests through the FirstSearch service—a feature already available—but also to track those requests, saving staff time and decreasing the costs of interlibrary loan

**Q:** When will the FirstSearch staff view be available? What additional functionality is planned for the FirstSearch staff view?

**A:** The FirstSearch staff view was launched in August 2003 and is available now. Full interlibrary loan functionality will be available in June 2004. Most of the borrowing functionality was added in March 2004.

The following functions will be added in June 2004:

- Review file processing
- Request history
- Saving requests

Additional functionality will be added through June 2005.

For more information, and to stay up to date on the latest developments, visit the New Directions in Sharing migration site at:

<http://www.oclc.org/ill/migration/default.htm>

To sign up for the OCLC-SHARING-L mailing list, a broadcast-only distribution list announcing the latest OCLC ILL news, please point your web browser to:

<https://www3.oclc.org/app/listserv/sharing/>

**Q:** What if my library doesn't have a FirstSearch account?

**A:** Libraries will not have to purchase separate access to FirstSearch in order to use the new ILL system. A library that does not have a FirstSearch account will be provided for with staff view-only access to FirstSearch. More information about this will be forthcoming.

**Q:** How will pricing change? Do I have to subscribe to OCLC ILL to continue to use the service?

**A:** OCLC pricing for ILL will consist of three models:

- *Subscription pricing.* Available now, initial pricing is determined based on past usage with a discount applied based on lending credit history. Future price increases for subscribers will not be tied to usage, so a library can increase use of interlibrary loan, expanding service to users, without worrying about rising costs.
- *Transaction-based pricing.* A simplified version of the current transaction-based pricing model will be used in the FirstSearch staff view, and lending credits will be given. Libraries will be charged for searching/display holdings, producing an ILL request and ILL Fee Management.
- *FirstSearch block searches.* Libraries will be able to purchase FirstSearch blocks and pay in advance for their ILL requests. This will allow libraries that do not wish to purchase subscription ILL to budget for their ILL usage in advance.

Currently, if you create a request from within the FirstSearch staff view, you are billed the same as an ILL Direct Request, ILL4507. When current access (Passport for ILL, ILL ME and ILL Web) is discontinued, libraries that do not opt for subscription pricing will be automatically shifted to transaction-based pricing. This simplified transaction price will reflect the average price paid for searching and producing an ILL request through the current ILL system.

MINITEX will be sending a subscription price quote to each library that is currently using OCLC ILL.

**Q:** What is included in a subscription to OCLC ILL?

**A:** A subscription includes the following:

- Unlimited ILL services (searching, holdings, produces)
- Unlimited use of ILL Fee Management
- ILL Management Statistics
- Union listing

For more FAQ's about the ILL Migration, please visit the OCLC Website at:

<http://www.oclc.org/ill/migration/faq.htm>

[OCLC Website, 4/23/2004; Virginia Dudley, MINITEX; edited]

## **Revision to OCLC Technical Bulletin 248**

*Technical Bulletin 248: OCLC ILL Policies Directory* has been revised. The revised version is available at:

<http://www.oclc.org/support/documentation/ill/tb/248/>

The revisions to this technical bulletin include:

- Authorization information has been updated. (The Policies Directory can now store authorizations and passwords.)
- Information on session timeouts has been added. (This is a new feature of the Policies Directory.)
- Information on group capabilities has been added throughout.
- Information on changing ILL supplier status has been added. (This is a new feature in the Directory.)
- All screen shots in this technical bulletin have been updated.

For a complete list of OCLC technical bulletins, with online links, please go to:

<http://www.oclc.org/support/documentation/technicalbulletins/>

If you have any questions regarding OCLC Tech Bulletins or the OCLC ILL Policies Directory, please contact the MINITEX Bibliographic and Technical Service unit (800-462-5342, 612-624-4002, [mino@othello.minitex.umn.edu](mailto:mino@othello.minitex.umn.edu)).

[Peter Insabella, OCLC, Docupdate-L electronic posting, April 27, 2004]

## REFERENCE SERVICES

### Recent Enhancements to WorldCat on FirstSearch

On April 18, the WorldCat database on FirstSearch was moved to a new technology platform that has enabled several major enhancements to searching.

Foremost among these enhancements are:

- The Keyword (default) index for WorldCat now includes Author Keywords, ISBNs and publication dates. Users are more likely to have successful searches and get expected results with the inclusion of these search parameters. In particular, the addition of Author Keyword mirrors the operation of many local systems and other search services.
- The default ranking by holdings has been made more accurate by basing the rankings on actual holdings counts rather than by ranges of holdings. The exception is that records with 0-5 holdings will be ranked together, rather than by actual counts. The more accurate ranking method will allow users to judge their results more easily.
- Non-English articles will be removed from the start of phrases. Users will get consistent results from phrase searching, no matter what language is used.

The reloading of WorldCat on FirstSearch has also enabled a number of other enhancements. These include new indexes and minor display changes designed to improve results. After the installation of these changes, users will get different results – most noticeably in the Keyword Index – from the same searches they did previously. Please note that neither the old results nor the new results are erroneous; the indexing has simply changed.

[OCLC Website, 4/26/2004]

## DIGITAL PRESERVATION

### OCLC Preservation Services

OCLC Preservation Service Centers now provide not only microfilming and microfilm preservation services, but also scanning of microfilm and print materials, metadata creation, OCR services, consulting and a range of other custom services for developing and preserving digital and microfilm collections.

Learn how OCLC's preservation solutions can add value to your collections while preserving them for generations to come. *Making the Case for Preservation Services*, a 10-minute online video, takes you on a tour of an OCLC preservation lab and shows you the breadth of OCLC's service offerings. These services can solve preservation challenges and help optimize access to your rare materials, manage your resources, and provide improved service to your patrons.

For more information, and to take the video tour, go to:

<http://www.oclc.org/preservation/default.htm>

*OCLC Abstracts*, March 29, 2004; OCLC Website, 4/26/2004