

ANNOUNCEMENTS

OCLC Selects Oracle for New Technology Platform

OCLC has selected Oracle database technology as the new platform for WorldCat (the OCLC Online Union Catalog) and its online services in cataloging, resource sharing, and reference as part of its global strategy to transform WorldCat into a globally networked, web-based information resource of text, graphics, sound, and motion.

In operation since 1971, WorldCat is the world's largest bibliographic database, containing more than 47 million records and 800 million location listings. More than 39,000 libraries in 76 countries use WorldCat to support their cataloging, interlibrary loan, and reference activities.

"Oracle's relational database management system will enable us to provide access to not only bibliographic information, but abstracts, full text, images, and sound files customized to the needs of libraries and users around the world," said Donald J. Muccino, OCLC executive vice president and chief operating officer.

OCLC will implement the new technological platform in phases, starting in late 2001. The Oracle platform will replace proprietary systems that OCLC has developed and updated over the past 30 years.

"The new database system will enable us to support UNICODE as well as the IFLA [International Federation of Library Associations and Institutions] Functional Requirements for Bibliographic Records standards," Muccino said. "We will also be able to consolidate systems used to support our online cataloging, interlibrary loan and reference services. This holds the promise of reducing operating costs and development time as we move forward with new services based on open systems architecture and international standards."

Muccino noted that when OCLC implements UNICODE in the Oracle environment, it will be able to store records from all of the world's written languages in the vernacular. The new platform is part of OCLC's new global strategy to extend its cooperative services to more libraries around the world.

Headquartered in Redwood Shores, CA, Oracle Corporation (Nasdaq: ORCL) is the world's leading supplier of software for information management and the world's second largest independent software company. Oracle offers its database, tools and application products, along with related consulting, education and support services, in more than 145 countries around the world.

[OCLC News Release, July 17, 2001; edited]

GENERAL

Searching WorldCat Reference Card Available in Print

A revised *Searching WorldCat Reference Card* is available in print and on the OCLC web at:

<http://www.oclc.org/oclc/man/10082ints/10085src.htm>

The Reference Card gives:

- Basic instructions for searching, whether you are using OCLC CatME for Windows (or OCLC Arabic Cataloging or OCLC CJK software), the OCLC Cooperative Online Resource Catalog (CORC) service, or OCLC Passport for Windows
- Formats and examples of all four search methods: numeric, derived, keyword, and title phrase scanning
- An updated list of keyword indexes
- Changed formats for ISSN and LCCN searches
- Stopword lists (that is, words to omit at the beginning of certain kinds of searches)

Please order no-charge copies from the MINITEX Bibliographic and Technical Services Unit (800-462-5348, 612-624-4002, mino@othello.minitex.umn.edu) or from OCLC at orders@oclc.org. Searching for Bibliographic Records Quick Reference (REF2078) is now obsolete. Please discard older copies.

[Lois Yoakam, OCLC, *Bits and Pieces*, July 2001; edited]

COMMUNICATIONS AND ACCESS

Windows 95 Support Ends Dec. 31, 2001

Microsoft has outlined plans for ending support for Windows 3.X and Windows 95 on Dec. 31, 2001. At that time, OCLC will discontinue supporting OCLC Windows-based products under these versions of Windows. OCLC expects that the products will continue to work; however, no testing will be completed under these versions of Windows, and users contacting OCLC with problems will be asked to upgrade to a newer version of Windows.

In the future, OCLC expects to discontinue support for various versions of Windows at the same time as Microsoft. A large amount of effort is spent on testing the various versions of Windows; focusing on testing only the Microsoft-supported versions of Windows will allow OCLC to better allocate resources.

Microsoft has outlined lifecycle plans at:

<http://www.microsoft.com/windows/lifecycle.asp>

Based on information currently available, OCLC expects to end support for Windows 98 and Windows NT 4.0 on June 30, 2003.

The OCLC Access Suite Applications System Requirements document at:

<http://www.oclc.org/oclc/menu/suite/systemrequirements.htm>

will be updated to include information about these changes. The OCLC Access Suite applications currently supported by Windows 95 will be affected by this.

If you have questions, please contact David Whitehair at OCLC or contact the MINITEX Bibliographic and Technical Service Unit (800-462-5348, 612-624-4002, mino@othello.minitex.umn.edu).

[David Whitehair, OCLC, NETLIST-L, July 26, 2001: edited]

COLLECTIONS AND TECHNICAL SERVICES

Institution Symbol Expansion Planned for Aug. 12, 2001

OCLC has assigned more than 38,000 three-character institution symbols for use across the OCLC system. To allow each symbol to remain unique, OCLC plans to begin to assign longer symbols to new institutions on Aug. 12, 2001. Newly assigned institution symbols will be five characters.

The holding library codes (located in the 049 field) for the expanded symbols will remain four characters and will no longer be unique across the OCLC system. You may choose any combination of four-character holding library codes, for example, MAIN, REFR, etc., for use in the 049 field. The holding library code must begin with an alpha character A through Z. The last three characters can be A through Z or 2 through 9. OCLC will not assign special characters, but those currently in the system will continue to be supported.

Current OCLC members will continue to be identified by their existing three-character OCLC symbols and four-character holding library codes. See *Technical Bulletin 242* for additional information about symbol expansion:

<http://www.oclc.org/oclc/tb/tb242/>

[Susan Walker, OCLC, *Bits and Pieces*, July 2001; edited]

Additional Validation Changes Related to Bibliographic Records, July 2001

In addition to the validation changes outlined for bibliographic records described in *Technical Bulletin 244, OCLC-MARC Format Update 2001*, some validation changes were made in July to invalidate some elements as announced in previous MARC updates and for changes related to the clean up of known errors in WorldCat bibliographic records.

Invalid Elements

The following elements will be made invalid in accord with previous MARC update documentation. All occurrences have been removed from WorldCat.

- 1) Language code "esk"
- 2) Field 212
- 3) Field 561 subfield \$b

Changes Related to Database Clean Up

- Relationship added to disallow Elvl coded as "I" when field 042 contains one of the CONSER codes, e.g., lc, lcd, msc, nsdp, nst, nlc, isds/c, etc.
- Non-filing indicator value 1 will be made invalid in fields 130, 240, 243, 245, 440, 630, 730, 740, and 830
- Relationship added to disallow non-filing indicator values 2-9 in fields 130, 240, 243, 630, 730, and 830 when Desc in the fixed-field is coded "a"
- Relationship between field 773 and BLvl in the fixed-field will be removed to better accommodate electronic resources

[Rich Greene, OCLC, *Bits and Pieces*, July 2001; edited]

OCLC Pinyin Conversion Progress Report

During June 2001, OCLC completed the conversion of Chinese language bibliographic records in WorldCat (the OCLC Online Union Catalog) from the Wade-Giles transliteration scheme to pinyin. Approximately 710,000 records coded "chi" in the Language fixed field (008/35-37) were converted. Two categories of records were purposely deferred so they could be converted along with the non-Chinese language records later in 2001. One category includes records with numerous Language codes in field 041, and, especially, records that contain Japanese and/or Korean codes as well as Chinese. The second category is score and sound recording records that are coded "N/A" in the Language fixed field but are identifiably Chinese. Because of the special challenges associated with these records, they will be treated using the even more conservative non-Chinese record conversion algorithms. OCLC expects to convert these two categories plus the non-Chinese language records starting in Oct. 2001 and completing them before the end of the year.

In addition, OCLC has restored Chinese vernacular data to about 4,200 records from which it was inadvertently lost in an earlier phase of the conversion process.

OCLC has worked in close cooperation with the Library of Congress and the Research Libraries Group in planning and testing this massive conversion process over the past two years. The conversion was designed to be conservative, so as much data as could be converted safely and reliably would be converted. At the same time, OCLC tried to minimize the chances for erroneous conversions. Please remember that for the conversion to work correctly, all bibliographic records that have been created in pinyin or that have been manually converted to pinyin should contain the marker field 987. This includes records submitted to OCLC for batchloading. The presence of field 987 will assure that the record is not inadvertently converted again by the pinyin conversion software.

Of course, as with any conversion of this size and complexity, there inevitably will be records that have been converted incorrectly. The Library of Congress is currently working on both identifying and fixing records in known areas of problematic conversions. OCLC users with Chinese language skills have the ability to correct many records on their own as they come across them. (Remember that you must be using OCLC CJK software to lock and replace any record with vernacular data.) Minimal Level records (Encoding Levels K, M, 2, 3, 5, 7, and all 4s that do not include field 042 with code "pcc") may be locked, corrected, and replaced by any OCLC user with a Full Level authorization or above.

If you are a participant in CONSER or OCLC's Enhance program (as many OCLC CJK users are), you are additionally encouraged to fix any incorrectly converted records with Encoding Levels higher than minimal, in accordance with your CONSER, Regular Enhance, or National Level Enhance authorization.

OCLC users are strongly urged to report (via the usual error reporting mechanisms) any erroneously converted records that they are not authorized to correct themselves. The full range of paper and electronic means of reporting errors in OCLC records can be found in Chapter 5 "Quality Assurance" of OCLC's *Bibliographic Formats and Standards* (in print, p. 59-72).

For an outline and explanation of the conversion process that was jointly developed by LC, RLG, and OCLC, as well as answers to many questions about the conversion, see the LC "Pinyin Conversion Project" website.

You may contact OCLC's Midwest Region Marketing Manager Chris Mottayaw (e-mail: chris_mottayaw@oclc.org; phone: 800-848-5878 x6476; fax: 614-718-7444) for more information about the local pinyin conversion service options. Please address questions concerning the specifications for the bibliographic conversion to Philip Melzer, Team Leader, Korean/Chinese Cataloging Team, Library of Congress at pmel@loc.gov

[Jay Weitz, OCLC, *Bits and Pieces*, July 2001; edited]

Replacing Master Records in CORC

The rules that govern who can replace records and which records they can replace are the same in CORC as they are in the OCLC Cataloging Service. You may correct a record that you entered if no other library has added holdings.

In some cases, however, you can always replace a record, even if someone else has added holdings. Minimal level records can always be replaced by a full cataloging user. Also, some data, such as contents notes and URLs can be changed, even if the record is coded as full.

The description of the replace capabilities can be found in chapter 4 of the *OCLC Cataloging Service User Guide, 3d ed.*

<http://www.oclc.org/oclc/cataloging/guide/index.htm>

[Rich Greene, OCLC, *Bits and Pieces*, July 2001; edited]

RESOURCE SHARING

Available Soon: Web Interface to OCLC Interlibrary Loan Service

Currently, the OCLC Interlibrary Loan service is accessible via OCLC Passport software. A new web interface to OCLC will be released in Aug. 2001. Web access is an additional interface to the OCLC ILL Service designed for infrequent ILL users, student workers, and staff who substitute for regular ILL staff. It does NOT replace Passport access.

The Web interface:

- Is easy to use; no commands are involved.
- Offers task screens that lead you through an ILL transaction.
- Offers links to OCLC Participating Institutions, validation sources, and other OCLC web resources.

You can use any current OCLC ILL service authorization and password. You need not sign up to use the web interface.

Technical Bulletin 245 (forthcoming) will give more information about the new interface. OCLC will notify you about installation of the web interface via a logon Message-of-the-Day.

[Cathy Kellum, OCLC, *Bits and Pieces*, July 2001; edited]

ILL Document Supplier Program: Center for Research Libraries

This month's featured participant in the OCLC ILL Document Supplier Program is the Center for Research Libraries. The following article details its collections along with some ILL policies.

The Center for Research Libraries provides loans primarily to member institutions. It loans materials to nonmembers for a fee. The Center for Research Libraries collects and stores infrequently used library research materials. The collection consists of more than 5 million items in many languages and subjects. It includes newspapers and periodicals, state documents, Chinese mainland publications, Russian Academy of Sciences Serials and Monographs, IGY meteorological records, foreign doctoral dissertations, and textbooks.

Holdings can be found in WorldCat (the OCLC Online Union Catalog).

For complete lending policies and workform instructions, please see Name-Address Directory record NACN :2895, or contact Center for Research Libraries.

Center for Research Libraries
6050 South Kenwood Avenue
Chicago, IL 60637
Telephone: 773-955-4545
Fax: +773-955-4339
URL: <http://www.crl.uchicago.edu>

[Mark Tullos, OCLC, *Bits and Pieces*, July 2001; edited]

REFERENCE SERVICES

Reference Services in the New Millennium

Results of a survey of ARL libraries found the following trends in reference services:

- Range of electronic options: The emphasis is clearly and quickly changing to all Web-based products; CD-ROMs are being phased out as much as possible.
- Less emphasis on mediated services: Mediated online services have declined – both in number of libraries that offer the services and number of searches performed. Dialog (95%) and STN (44%) are the preferred mediated services.
- Online services for end-users: The emphasis is definitely on adding more and more Web-based subscription databases for students and faculty. Services like OCLC, SilverPlatter, and ProQuest that offer a combination of bibliographic resources and full-text access to periodicals are the most popular.
- Fewer questions and more time: The number of reference questions has gone down, but each question takes longer on average to answer. The reasons: Reference questions have become more complex and sophisticated, expectations are higher, and the number of sources now available has increased.
- Digital reference: Reference work is no longer limited to people who walk through the doors; libraries now receive a growing number of reference questions electronically.
- Reference librarians: Librarians find their jobs satisfying and rewarding, but the pace of change can be intimidating, and they find themselves with more to do and less time to do it.

[Carol Tenopir and Lisa A. Ennis, "Reference Services in the New Millennium," *Online* 25 (4): 40-45; 2001 July/August; edited]

How to Subscribe to PAIS and FirstSearch Statistics Modification

Subscribe to PAIS International Database

If you don't yet subscribe to PAIS International on FirstSearch, now is the time. OCLC is offering discounted pricing to new subscribers to the PAIS International database on the OCLC FirstSearch service. The pricing is effective for subscriptions beginning July 1 – Dec. 1, 2001.

For details contact Mary Parker (800-462-5348, 612-624-4002, m-park1@tc.umn.edu).

Better Access to FirstSearch Statistics

FirstSearch online statistics reports have been modified so users coming in from dedicated IP lines, Digital Island connections, and the Birmingham (UK) node will automatically be redirected to a URL that supports their access method. (Previously these users had to type in the URL.)

[Tam Dalrymple, OCLC , *Bits and Pieces*, July 2001; edited]