

MINITEX/OCLC MAILING

A PUBLICATION OF THE MINITEX BIBLIOGRAPHIC AND TECHNICAL SERVICES UNIT

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ANNOUNCEMENTS

MINITEX/OCLC USER GROUP MEETING PRESENTATION AVAILABLE ONLINE

“Creating the Capacity for Change: Transforming Library Workflows and Organization,” the 2008 MINITEX/OCLC User Group meeting, was clearly a case of the right topic at the right time -- 160 people from 52 institutions registered for the event! Hosting the session in all three states made it somewhat easier and more affordable for folks to attend. Rick Lugg and Matt Barnes, from R2 Consulting, LLC, made a compelling argument for a careful evaluation of current technical services processes, workflow and resource allocation with the objective of addressing the question: “Where might we find or create additional capacity by changing what we do and how we do it?” One recommendation is to create a “mainstream” – a critical mass of similar activity that is processed in as linear a fashion as possible – and to expand and automate it as much as possible.

While reminding us why we can't just keep doing what we've always done, they emphasized that going through this sort of workflow analysis enables us to make reasoned judgments on when to say “just say no” so that we “just say yes” to other roles and opportunities and functions that will better serve our users and move our libraries toward greatness.

To view Rick and Matt's presentation, go to:

<http://www.minitex.umn.edu/events/highlights/2008/oclcUserGroup>

To see a few pictures from the event, visit the recent blog post by Mark Wilhelmi:

http://blogs.minitex.umn.edu/bats/2008/10/2008_minitexoclc_user_group_me.html

Carla Dewey Urban; MINITEX/BATS

GENERAL

ARE YOUR LIBRARY LINKS UP-TO-DATE IN WORLDCAT?

Deep linking connects a search result in OCLC WorldCat to the record in your local catalog. It also enables web users to link from search results (from search engines including Yahoo!, Google, and other partner sites) to the Find in a Library interface, better known as WorldCat.org, and, then,

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A Program of the Minnesota Office of Higher
Education and the University of Minnesota

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directly to the record in the catalog.

We ask staff of MINITEX participating libraries to please check your “deep links” to make sure they are working. MINITEX staff who process interlibrary loan requests have reported a number of dead links, which means problems for library staff and library users alike.

Keeping your links from WorldCat to your local catalog up-to-date is important for two main reasons:

- Interlibrary loan staffs rely on this information when they request an item from your library. For example, MINITEX document delivery staff check an item’s circulation status by clicking on the library link in WorldCat that connects to the item in your local catalog. If this link is broken, the system usually takes staff to your library catalog’s homepage, and they have to retype the search.
- Library users may come across your library on the web via WorldCat.org and see that your library holds the item. By clicking on the library name, the user can be directed to the exact item in your local catalog – provided the link is working properly.

There are two places you should check to make sure your links are set up correctly: the Administrative module on the FirstSearch platform AND the WorldCat Registry.

The WorldCat Services Administrative Module (formerly called FirstSearch Administrative Module) is a set of web-based administration tools. Library staff can make cosmetic changes to the WorldCat interface, and it is also here that staff can update or check their libraries’ “deep links” from WorldCat to their local catalog to make sure they are working. It’s likely that whoever at your institution handles access to your institution’s electronic resources also has access to the WorldCat Services Administrative Module. You can get to the WorldCat Services Administrative Module by visiting the following URL:

<http://www.firstsearch.oclc.org/admin>

The WorldCat Registry is an online directory that contains information about libraries, such as global interlibrary loan policies and web and physical locations. The information

here also controls how your library information is displayed in the WorldCat.org interface. Since the WorldCat Registry is relatively new, your library may not yet have a designated staff person to maintain your library’s entry. You can get to the WorldCat Registry and check to make sure your library information is complete by visiting the following URL:

<http://www.worldcat.org/registry>

Below are instructions on how to check your links in both places and make any needed changes.

How to Change your Links in the WorldCat Services Administrative Module

- Go to: <http://www.firstsearch.oclc.org/admin>
- Log on with your FirstSearch Administration authorization. If you do not know it, check with the staff person who handles setting up WorldCat access for your library. MINITEX staff in the Bibliographic and Technical Services unit can check your authorization and password for you also.
- After logging on, click on the “Linking” tab, then, on the left navigation bar, click on “Web Library Catalogs.”
- In the first section under “Catalog Entry Screen URL,” type in your OPAC homepage’s URL.

Below that, there are three types of “deep links” listed: ISBN, ISSN, and OCLC. We recommend that you fill out ONLY the ISBN and ISSN links. If you provide all three URLs – ISBN, ISSN, and OCLC -- the default will link by OCLC number. We do not recommend this URL unless you are absolutely certain that it will work consistently. On the other hand, if a large part of your collection contains items without an ISBN or ISSN (such as government documents), you may want to consider using the OCLC Search Results URL. Contact the MINITEX BATS staff if you are unsure.

Below is an example of what an ISBN search results URL might look like for an institution using Ex Libris Aleph as their local ILS (Note: even this URL varies depending on your Aleph implementation):

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http://library_opac_baseURL/F/?func=findb&local_base=uli02&find_code=WSB&request=

To fill out the ISBN and ISSN deep links, you probably will need to talk to your local system administrator. Or, you can contact the MINITEX/BATS Unit. We have samples from different institutions in the MINITEX region that we know work.

Alternatively, you can try a new tool in the WorldCat Registry that suggests links for you to use. See the section, “How to Change your Links in the WorldCat Registry,” below for more information on how to auto-configure your links.

After filling out the Search Results URLs, you can click on the test button to see if these links work. Don’t forget to save your changes! The changes take effect right away for people searching WorldCat via the FirstSearch platform, so searchers should see a link when your holdings display that takes them directly to your local catalog. It takes up to 24 hours for these changes to take effect in the Worldcat.org interface.

If you want to see a tutorial of how this works, check out:
<http://www.minitex.umn.edu/events/training/archived.asp#145>

How to Change your Links in the WorldCat Registry

You may have heard about the WorldCat Registry – a free online directory that contains information about libraries, such as global ILL policies, web and physical locations. Also, the information you enter here controls how your library information is displayed in the WorldCat.org interface.

Please check your institution’s information in the Registry, to, at least, make sure that your “deep links” are the same as those you have entered in WorldCat Services Administration. This is important because, if anyone at your institution changes your registry profile, it will override the deep link information you have entered in WorldCat Services Administration.

OCLC has released three new tutorials to help users update their Registry profiles. Check out the “How to Connect Patrons to Your Library” tutorial available at:
<http://www.oclc.org/us/en/support/training/registry/>

<tutorial/default.htm>

Also, a new tool was just added to the WorldCat Registry to help library staff determine which search results URLs to use in the WorldCat Registry. You can choose your ILS vendor from a drop down list, paste in your library OPAC homepage, and the system will suggest the ISBN, ISSN, and OCLC search results URLs. You have to be logged on to the registry and in edit view in order to use this feature.

Summary

Make sure you have tested your deep links in WorldCat Services Administration AND the WorldCat Registry and that the links in both places match each other exactly. Unless you move to a different ILS, you should not have to change your links again. Keeping your links up-to-date ensures that web users and interlibrary loan staff can easily find and borrow items from your library.

OCLC eSERIALS HOLDINGS

OCLC’s eSerials Holdings service is a great way to keep your electronic serials holdings up to date in WorldCat. Since it is free (with an OCLC Cataloging subscription) and simple to implement, it is a very cost-effective and efficient way for you to make your library’s electronic serials more visible. With this service, both staff and patrons using any of the WorldCat interfaces will be able to find and use these valuable resources in your library’s collection easily.

Once a month, the service automatically sets and maintains your journal title level holdings by matching them against existing electronic serials MARC records in WorldCat. And, now, there is also the option for getting OCLC MARC records for your titles to add to your own online catalog. (This option has a separate subscription cost.)

If you use WorldCat Link Manager, EBSCO LinkSource, Serials Solutions 360 Link, or TDNet e-Resource Manager, OCLC works with these partner vendors to receive your list of ISSN-based electronic serials. If you use another serials provider or link manager (including SFX), you can contribute your holdings data directly to OCLC.

Some Things to Remember

- The eSerials Holdings Service is available to all libraries with a cataloging subscription at no additional charge

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- The service sets title-level holdings and only works for ISSN-based electronic serials

Go here for more information:

<http://www.oclc.org/us/en/serialsholdings/default.htm>

You order the service by way of the OCLC Online Service Center, but it would be best to start with the Ordering Guide and its accompanying checklist:

<http://www.oclc.org/support/documentation/serialsholdings/ordering/OrderingGuide.pdf>

MARC Record Delivery Option

With this additional option, you receive MARC bibliographic records that correspond with your monthly eSerials holding updates.

- This option is not included in your cataloging

subscription. There is a nominal charge which is based on the number of titles delivered

- You can customize your records - Add or delete fields or add customized URL links in 856 fields.

To order, go to the OCLC Online Service Center:

<https://www.oclc.org/webapp/wcs/stores/servlet/OSCPortal>

Please contact the BATS unit if you have questions or need help with the order process (Contact information at the end of this *Mailing*). Also, there are 11 libraries in the MINITEX region using the eSerials Holdings Service, and if necessary, we can put you in touch with someone with first-hand experience. The vendors these libraries work with include EBSCO, Serials Solutions and ExLibris SFX.

Virginia Dudley, MINITEX

CATALOGING

TECHNICAL SERVICES SESSIONS AT MLA

Are you attending the Minnesota Library Association's Annual Conference on Nov. 19-21? Make sure to check out the following sessions that are sponsored by the Technical Services Section of MLA.



Preconference: Cataloging Cartographic Resources

Presenter: Stacie Traill, Cartographic, Electronic Resources, and Project Cataloger, University of Minnesota Libraries

This preconference will give a brief introduction to cataloging cartographic (map) resources, focusing on sheet maps and atlases. The session will cover the key elements of description and subject access for cartographic materials and will attempt to demystify the use of MARC fields specific to maps. It is intended for the cataloger who is comfortable cataloging book and/or other formats, but would like to learn more about cataloging maps.

- Wednesday, Nov. 19, 8:00 a.m. - 11:30 a.m.

Introduction to RDA/FRBR

Presenter: Chew Chiat Naun, Principal Cataloger Technical Services, University of Minnesota Libraries
If RDA is the answer, what was the question? This session will present an update on Resource Description & Access, the new set of cataloging rules being prepared, and an introduction to FRBR (Functional Requirements for Bibliographic Records), a model used in these new rules. It will consider the road ahead for RDA and its users, including such questions as these: How do RDA and FRBR relate to the current environment for libraries? What benefits can we expect from them? What will we need to implement them successfully?

- Wednesday, Nov. 19, 2:00 p.m. – 3:15 p.m.

New Directions for OCLC and MINITEX

Presenter: Sara Ring, Coordinator of Bibliographic and Technical Services, MINITEX

Come to hear about new OCLC products and services (such as WorldCat Local), changes in OCLC governance structure, and new training opportunities for OCLC and MINITEX member libraries. Bring your OCLC questions to this session.

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- Wednesday, Nov. 19, 4:00 – 5:15 p.m.

Rethinking Tech Services: A Workflow Analysis

Presenters: Angi Faiks, Associate Director, Macalester College Libraries; Bobby Bothmann, Electronic Access Catalog Librarian and Leslie McPhail Peterson, Minnesota State University, Mankato and panelist TBA.

Are you thinking that it may be time to revisit how your technical services area functions at your library? This session will feature a panel of staff from libraries that have recently undergone a technical services workflow analysis. They will discuss the process, point out the pros and cons of the process, the end result, explain how it impacted their current work, and answer questions from the audience

- Thursday, Nov. 20, 8:00 – 9:15 a.m.

Sara Ring; MINITEX/BATS

BIB FORMATS & STANDARDS NOW INCLUDED IN CATALOGER'S DESKTOP

OCLC Bibliographic Formats and Standards has now been incorporated into Cataloger's Desktop, an online product

of the Library of Congress. On October 8, 2008, LC announced that Bib Formats & Standards is now fully indexed and searchable in Cataloger's Desktop. Also, with its next update (2008 Issue 4), Cataloger's Desktop will include links from the MARC 21 Format for Bibliographic Data to OCLC's Bibliographic Formats and Standards.

Cataloger's Desktop brings together the most widely used cataloging documentation resources into an integrated, online system. Desktop includes the current version of the Anglo-American Cataloguing Rules (AACR2), the MARC 21 formats, Describing Archives, a Content Standard (DACS), and over 250 other cataloging and metadata resources.

For more information about Cataloger's Desktop, to request a 30-day trial, or to place an order, go to:
<http://www.loc.gov/cds/desktop>

NOTE: It is not possible to order Cataloger's Desktop through MINITEX. Since it is an LC product, it must be ordered through LC's Cataloging Distribution Service (CDS).

Virginia Dudley, MINITEX/BATS; LC Announcement dated Oct. 8, 2008

LOCAL HOLDINGS MAINTENANCE

HOW TO HANDLE LOCAL HOLDINGS IN MULTIPLE FORMATS

Many libraries in our region have holdings in their collections for the same item in multiple formats. In the past, it was often a situation of current issue in print with older issues on microfilm or microfiche; more recently the situation is often some amount of print plus electronic versions of the publication. In either case, the question arises, how do we represent these holdings in our Local Holdings Records (LHRs) in OCLC?

This is a question that has been debated for years in the library community, and it is still being debated today. On the one hand, there are arguments in favor of using a separate bibliographic record for each holding, which lead to the question of how to connect a user to all the separate pieces. On the other hand, putting all of our holdings on

a single record makes it easier to find the pieces, but care must be taken to help a user distinguish what is actually held.

While no one seems close to reaching a universally acceptable answer, OCLC allows our libraries to choose how they will represent holdings in multiple formats.

Option 1: Separate Record Reporting

According to the current AACR2 cataloging standards, each holding should be attached to a bibliographic record that describes its physical format as well as its publication information and history. This means that, to adhere to the standard, we should have each Local Holding Record attached to the bibliographic record that corresponds to the physical format of the holdings: print holdings on a print record, microfilm holdings on a microfilm record, etc.

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LOCAL HOLDINGS MAINTENANCE (CONTINUED)

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This standard is something that we at MINITEX have tried to encourage staff of MULS participating libraries to follow, so many MULS libraries already have holdings that fit this standard. For an example of this kind of holdings, see the TQI Local Holdings Records on the print and electronic versions of *The Christian Science Monitor*. (ISSN 0882-7729 / OCLC #10969332 and OCLC #35351012).

The advantage of this method of reporting, of course, is that the bibliographic record carries all of the descriptive elements so searchers know about the format of the issues your library holds, and the bib record can describe any differences between the original publication and the reproduction or alternate format. Separate LHRs mean that each holding can be updated independently, and OCLC ILL deflection system recognizes the holding format from the format code in the bib record, so it can apply the correct policies to any ILL request.

The major problem with this separate record reporting method is the need to let folks know that your library has holdings attached to more than one record. You can supplement the holdings data by including a cross reference note in the LHR that directs users to your holdings in other formats on other records. To make these notes as useful as possible in as many environments as possible, we recommend identifying these additional records by both ISSN and OCLC number. So, for example, the holdings on the microfilm record would refer the reader to the print record and read something like:

“For hardcopy see ISSN 0041-2136 / OCLC #23154681.”

You'd want to include the cross reference notes in both the LHR summary field and in the public note field (\$z) of the 863. And, if you had holdings only in a non-print format that reproduced a print publication (e.g. you hold only the microfilm version of a print publication), you'd put a LHR on the print record that referred searchers to your microfilm holdings.

Option 2: Single Record reporting

It is possible (though not strictly according to standards) to represent your holdings in OCLC with a set of Local Holdings Records attached to a single bibliographic record. Even though all the holdings end up together on the one bib record, it is still important to use separate LHRs for

each collection and each format. This will naturally lead to more complexity in creating the Summary field for your library, though not necessarily to a more complex Summary holdings statement.

For an example of this kind of holdings, see the TQI Local Holdings Records of *Nature*. (ISSN 0028-0836 / OCLC #1586310). Note that there are two print holdings, as well as microform and electronic holdings for TQI on this record.

When you display the local holdings for TQI, you see a summary screen indicating multiple Local Holdings Records, each of which specifies a holding in a single format. Using a separate LHR for each format/collection allows you to code the physical description code (007) and collection and shelving information (both of which are in the 852) to be specified for each part of the holding without making any one of the LHRs overly complex. Note that in the example, TQI has added a public note (863 \$z) to the non-print holdings, so that the different formats can be distinguished even in the summary display.

Among the most important codes to pay attention to are the lending and reproduction policy codes (elements 20 and 21 of the 008 field). This is because OCLC's ILL deflection system looks at these codes and can override the general policy for an item based on the codes in the LHR. When deflection looks at the OCLC Policies Directory to see whether an item may be loaned or reproduced, it checks the format of the bibliographic record to see which policies apply. If you attach electronic holdings to a print record, the ILL deflection system will treat them as print holdings. So, if you need to restrict borrowing based on format, you'll need to make sure the Lending and Reproduction policy codes are correctly coded in each LHR.

Remember that when an institution has multiple holdings on a single record, all the LHRs have the same shared Summary field. The summary represents the net total of all the holdings for that library, and doesn't have to be as detailed as the holdings in the 86x fields for the LHR. So, in this example, the net result is a fairly simple, open holding that starts in 1896 and continues into the present. The note in the LHR Summary field indicates there are multiple formats, but doesn't specify which format corresponds to which years. In another situation, you might want to be more specific. The most important thing is to be specific in each LHR and to be consistent throughout your records.

LOCAL HOLDINGS MAINTENANCE (CONTINUED)

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Two examples, of course, don't cover all the possible complexity that can arise in these kinds of situations. If you have questions about how to handle a complex holding, or would like to discuss the option of separate record or single record reporting of multiple formats, please feel free to contact Dave Linton in the MULS unit (Contact information at the end of this *Mailing*).

Dave Linton; MINITEX/MULS

DIGITIZATION & PRESERVATION

UPCOMING CONTENTdm WEBINAR

CONTENTdm: An overview

Presenter: Ron Gardner, OCLC Digital Services Consultant

Date: Nov. 12, 1:00 p.m - 2:00 p.m (Eastern)

During this one-hour introductory session, Ron will highlight the range of options that OCLC offers to support the entire digital life cycle; from planning and processing to managing, preserving and sharing primary source materials.

During the session, he'll focus on OCLC's CONTENTdm software and explain how it helps you to make everything in your digital collections available to everyone, everywhere. He'll also show digital library projects completed by organizations that have used CONTENTdm.

Note: This session has been designed for those who are considering CONTENTdm for their organization.

To register, go to the URL listed below:

<https://www3.oclc.org/app/request/bin/request.asp?specialCode=cdmwebinarNov12>

OCLC; edited

UPPER MIDWEST CONTENTdm USER GROUP SUMMARY

The first Upper Midwest CONTENTdm User Group Meeting was held on the campus of Macalester College, St.

Paul, MN, October 16-17, 2008, sponsored by MINITEX and WiLS (Wisconsin Library Services). Attendance was great for our first meeting – over 80 library and archives staff traveled from Minnesota, South Dakota, North Dakota, Wisconsin, Illinois, and Iowa, and even one person from Nevada attended. This first meeting provided the opportunity for networking and sharing of CONTENTdm best practices among colleagues, as well as a CONTENTdm product update and preconference.

If you didn't have a chance to attend, we have posted all of the presentations and handouts on the web at:

<http://www.minitex.umn.edu/events/highlights/2008/contentDm>

A special thanks to Macalester College, St. Paul, for hosting the user group meeting. The meeting was organized by a planning group composed of representatives from Minnesota, North Dakota, South Dakota, and Wisconsin. They were:

- Curt Hanson, Univ. of North Dakota, ND
- Debbie Cardinal, WiLS, Madison, WI
- Gae Kelly, Concordia University, Mequon, WI
- Josh Hickman, Beloit College, WI
- Kirsten Houtman, WiLS, Madison, WI
- Robert Russell, Northern State University, SD
- Shannon Shi, University of Minnesota, Morris, MN

Thanks to the planning group for all of their help in organizing!

Sara Ring; MINITEX/BATS

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OCLC Local Holdings Maintenance (formerly Union Listing).

The MINITEX/OCLC Mailing is an informational bulletin sent monthly to MINITEX/OCLC libraries. Permission to reprint with appropriate acknowledgement is granted. All articles should be attributed to MINITEX unless otherwise credited. This publication is available in alternative formats upon request. Please call Kay Kirscht, MINITEX (612) 624-4002 for further information.

The MINITEX Library Information Network is a publicly supported network of academic, public, state agency, 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

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MINITEX CALENDAR

TRAININGS, MEETINGS AND CONFERENCES

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 are interested in attending a workshop and have not received registration materials two weeks prior to the event, contact the MINITEX Office (612-624-4002, 800-462-5348). For OCLC training sessions, ask for Kay Kirscht. There is a registration fee for many of the events listed.

Some events listed on the calendar may be cancelled due to lack of registered participants. Cancellations and changes are highlighted by ****CANCELLED**** following the date of the event.

This calendar will be updated and posted at the beginning of each month. If you would like your event included in the calendar, please call Kay Kirscht at 612-624-3532.

NOVEMBER

- 11 Advanced Searching Using Connexion Client
10:00 a.m. – 11:30 a.m., CST
Online training session
<http://www.minitex.umn.edu/events/training/webinars.asp#165>
- 12 History Day @ Your Library
8:00 a.m. – 3:30 p.m., CST
Minnesota History Center
345 W. Kellogg Blvd., St. Paul, MN
<http://www.metrolibraries.net/library-wire/overview.html>
- 12 MnLINK User Group Meeting
The Northland Inn
7025 Northland Drive, Brooklyn Park, MN
<https://www.minitex.umn.edu/events/conferences/mnlink2008.aspx>
- 13 LSTA Grant Writing Workshop – Great River Regional Library
10:15 a.m. – 4:00 p.m., CST
St. Cloud Public Library, Bremer Community Room
1300 W. St. Germain. St. Cloud, MN
<http://education.state.mn.us/mdeprod/groups/Library/documents/Announcement/032661.pdf>
- 14 LSTA Grant Writing Workshop – Moorhead
10:00 a.m. – 4:00 p.m., CST
Lake Agassiz Regional Library
Moorhead, MN - location to be determined
<http://education.state.mn.us/mdeprod/groups/Library/documents/Announcement/032661.pdf>
- 14 WorldCat Collection Analysis
10:00 a.m. – 11:00 a.m., CST
Online training session
<http://www.minitex.umn.edu/events/training/webinars.asp#76>

- 19-21 MLA 2008 Annual Conference
10:00 a.m. – 4:00 p.m., CST
Sheraton Bloomington Hotel
7800 Normandale Boulevard, Minneapolis, MN
<http://www.mnlibraryassociation.org/conference.htm>
- 21 Teleconference: “Information Literacy for Life”
Presented by the College of DuPage
11:00 a.m. – 12:30 p.m., CST
S30B Wilson Library
Minneapolis Campus, West Bank Area
University of Minnesota - Twin Cities
<http://www.minitex.umn.edu/eventsteleconferences/#infoLitLife>
- 27 THANKSGIVING HOLIDAY
MINITEX Office closed
- 28 UNIVERSITY FLOATING HOLIDAY
MINITEX Office closed
- ## DECEMBER
- 2 What is Metadata? A Very Basic Introduction
10:00 a.m. – 11:00 a.m., CST
Online training session
<http://www.minitex.umn.edu/events/training/webinars.asp#200>
- 9 Dublin Core for Beginners
10:00 a.m. – 11:00 a.m., CST
Online training session
<http://www.minitex.umn.edu/events/training/webinars.asp#201>
- 25 CHRISTMAS DAY HOLIDAY
MINITEX Office closed
- 26 UNIVERSITY FLOATING HOLIDAY
MINITEX Office closed



JANUARY

- 1 NEW YEAR'S DAY HOLIDAY
MINITEX Office closed

- 14 What is Metadata? A Very Basic Introduction
2:00 p.m. – 3:00 p.m., CST
Online training session
<http://www.minitex.umn.edu/events/training/webinars.asp#200>

- 19 MARTIN LUTHER KING JR. DAY HOLIDAY
MINITEX Office closed

- 21 Dublin Core for Beginners
2:00 p.m. – 3:00 p.m., CST
Online training session
<http://www.minitex.umn.edu/events/training/webinars.asp#201>