

MINITEX/OCLC MAILING

A PUBLICATION OF THE MINITEX BIBLIOGRAPHIC AND TECHNICAL SERVICES UNIT

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ANNOUNCEMENTS

OCLC MEMBERS COUNCIL REPORT

Below is Wilbur Stolt's report on the most recent OCLC Members Council Meeting. Wilbur (Director, Chester Fritz Library, University of North Dakota) is our representative to the Council from the MINITEX region. His report includes some important information about the governance changes coming to OCLC.

Report to MINITEX Libraries on OCLC Members Council Meeting

OCLC Members Council met in Dublin, OH, Oct. 19-21, 2008. The OCLC Web site offers a summary of events and presentations which took place during the meeting and a summary may be found in the Nov. 10, 2008 *OCLC Abstracts* (Vol.11 no.45):

<http://www5.oclc.org/downloads/design/abstracts/11102008/memberscouncil.htm>

This report will not recount all the meeting's activities, but will provide a few observations to supplement the report provided by OCLC.

OCLC Board Election

Members Council elected Kathleen Imhoff, Executive Director and CEO of the Lexington, Kentucky Public Library, to serve a five-year term on the OCLC Board of Directors. This election filled the Board vacancy caused by the death of Victoria Johnson.

OCLC Governance

At the May 2008 meeting, Members Council approved changes to the Articles of Incorporation and the Code of Regulations. These changes recognize the global activity of OCLC through the establishment of a new governance structure based on Regional Councils and a Global Council.

The October meeting included a series of discussions about the proposed structural changes. The current proposal calls for the establishment of three Regional Councils based on geography and time zones. United States libraries would join with Canadian, Caribbean, Central American and South American libraries to form OCLC Americas Regional Council. The other councils would be OCLC Europe, Middle East and Africa (EMEA) and OCLC Asia-Pacific.

The charge for Regional Councils will include electing Member Delegates to a Global Council, serving as incubators for new ideas, and facilitating communications between members and OCLC management and staff.

Continued on page 2



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

ANNOUNCEMENTS

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Members Council has formed three implementation committees for the Regional Councils and they will be working with the OCLC Transition Team to establish the new groups with the goal of completing the transition by the last Members Council meeting in May 2009.

Members Council will also consider proposals for the OCLC Global Council. Items to be decided include size, composition and frequency of meetings. Global Council responsibilities will continue to include electing six (6) trustees to the OCLC Board and ratifying or rejecting changes to the OCLC Code of Regulations and Articles of Incorporation.

Records Use Policy

During the meeting Jay Jordan, President of OCLC, announced revisions to the Policy for Use and Transfer of WorldCat Records. The policy is posted at: <http://www.oclc.org/worldcat/catalog/policy/policy.htm>

It is scheduled to become effective mid-Feb. 2009. I encourage you to review the Policy and comment on it.

February Meeting

The February Members Council meeting will be conducted virtually using desk top conference software.

I wish to thank the MINITEX member libraries for the opportunity to serve as the OCLC Members Council Delegate from MINITEX. If you have questions, comments or concerns, please contact me at: wilburstolt@mail.und.edu or call 701.777.2189.

Wilbur Stolt, MINITEX Members Council Delegate; edited

UPDATED OCLC RECORD USE POLICY

If you are on OCLC-CAT or other cataloging listservs, you may have been reading the discussions taking place about the OCLC Policy for Use and Transfer of WorldCat Records. The Record Use Policy is intended as an update to the current Guidelines for the Use and Transfer of OCLC-Derived Records. You can view the current guidelines which will remain in effect until mid-February 2008, here:

<http://www.oclc.org/support/documentation/worldcat/records/guidelines/default.htm>

Why the need for an update? As stated in the FAQ on

OCLC's Web site:

The information landscape has undergone vast changes since 1987 when the Guidelines for the Use and Transfer of OCLC-Derived Records were last updated. In response to changing needs and opportunities for sharing WorldCat records, OCLC has updated the Policy to:

- *Respond to the changing information landscape*
- *Modernize the language of the Guidelines*
- *Clarify how WorldCat records can be used and shared*
- *Expand the opportunities for record sharing among member and non-member libraries, archives and museums*
- *Reinforce OCLC's support for WorldCat data sharing that encourages innovation and benefits libraries, museums and archives while protecting OCLC's members' investment in WorldCat.*

There is a summary page on OCLC's Web site that explains the major changes, and, from this page, you can view the new policy, or view the FAQ (which is updated very frequently):

<http://www.oclc.org/worldcat/catalog/policy/default.htm>

OCLC has been taking suggestions from members and incorporating them into the updated policy. If you have any questions or feedback for OCLC after reading the updated policy, please contact them directly at: recorduse@oclc.org

Sara Ring; MINITEX/BATS

WorldCat® Record Use Policy



GENERAL

MLA ANNUAL CONFERENCE HIGHLIGHTS

Staff from the Bibliographic and Technical Services (BATS) unit attended the Minnesota Library Association Annual Conference in Bloomington, MN, Nov. 19-21. Below is a brief summary of a few of the sessions we attended.

Cataloging Cartographic Resources

Presented by Stacie Traill, U of M Libraries.

Over the three hour session there was just the right amount of information presented to make me feel confident that I could catalog a map. I finally know what all that information in the 255 and the 034 mean and how to code it! The MARC 255 field contains the mathematical data like scale, projection, and coordinates and the 034 contains the coded mathematical data. The presenter brought along a number of excellent handouts, including an extensive bibliography that included many online resources.

Among the must have resources for cataloging maps, the presenter mentioned the *Map Cataloging Manual* (LC) and *Cartographic Materials: A Manual of Interpretation for AACR2, 2002 Revision*. 2nd ed.

I also attended all of the MLA technical services section (TSS) sponsored sessions. Most of the handouts were posted on the web and are available on the MLA Technical Services Section blog:

<http://tssmla.blogspot.com>

Sara Ring; MINITEX/BATS

Introduction to RDA/FRBR

Presented by Chew Chiat Naun, U of M Libraries.

RDA is intended to make libraries ready for change—to help them become compatible with non-MARC practice and with the practices of the commercial sector. LC and the other cataloging powers-that-be have yet to decide if they will implement RDA, but development is continuing. FRBR will be employed to make cataloging and discovery more efficient. There will be a number of rule changes: the Main Entry will be designated as the preferred access point, the ‘Rule of Three’ will be abolished, and separate records will be created for different versions of a given item. It is unclear at this time what will happen to all the old records—global change, cataloger review, or something else. Looking ahead, once RDA is introduced, standards and best practices will be developed. In the mean time, the advice is keep up-to-date and don’t panic. For more information, visit the Web site:

<http://www.collectionscanada.gc.ca/jsc/index.html>

Mark Wilhelmi; MINITEX/BATS

NEW DEEP LINKING FAQ

Do you have questions about how to update or change your “deep links” from WorldCat to you local catalog? Check out the new FAQ that we added recently to our Bibliographic and Technical Services (BATS) Web page. Look for the question “How do I update my links from WorldCat to my Local Catalog?”

<http://www.minitex.umn.edu/bats/faq.aspx>

Sara Ring; MINITEX/BATS

WORLDCAT.ORG ENHANCEMENTS

If you haven’t looked lately, check out the homepage of WorldCat.org and take a look at some of the recent enhancements. Or, check out the WorldCat Blog for announcements about enhancements, maintained by OCLC product staff:

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

Most recently, OCLC has incorporated reviews and ratings from WeRead users into WorldCat.org, alongside reviews from users, Amazon and EMRO (Educational Media Reviews Online). OCLC will be adding more and more evaluative content like this so users can determine if this is the library item they are looking for.

If you go to Worldcat.org and search for a title, you’ll notice a new tab called “Related Items.” OCLC has included some additional reading suggestions from WeRead users - “people who read this book also read...”

Below is a screenshot of the new tab “Related Items” along with the first two recommended items. I searched for the title “Tuesday” by David Wiesner.



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GENERAL (CONTINUED)

Continued from page 3

Searching for the same title, note that you can also rate any item, or read Reviews from Amazon and more.

Tuesday
by [David Wiesner](#)

☆☆☆☆☆
(not yet rated)

Type: Book : Fiction : Juvenile audience; English
 Publisher: New York : Clarion Books, ©1991.
 Editions: [10 Editions](#)
 ISBN: 0395551137 9780395551134 0395870828 9780395870822
 OCLC: 21970322
 Related Subjects: [Frogs -- Fiction.](#) | [Frogs -- Fiction.](#)
 Citations: [Cite this Item](#) | [Export to EndNote](#) | [Export to RefWorks](#)
 Additional Info: [Publisher description](#) | [Contributor biographical information](#)
 User-created lists: This item is featured on [5 public list\(s\)](#)

<p>Get It Search my library Buy from Amazon.com COinS Link</p>	<p>Save It Add This Page to Favorites Save to: <input type="text" value="[New List]"/> <input type="button" value="Save"/></p>	<p>Add to It Review this Item Tag this Item</p>
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Services from UNIV OF MINNESOTA, MINNEAPOLIS for this item: [Interlibrary Loan/ILLiad](#) | [Search the catalog at University of](#)

Libraries | Details | **Reviews** | Tags | Related Items

WorldCat User Reviews

[Write an online review](#) and share your thoughts with other readers.

Amazon Reviews ([View all Amazon reviews](#))

Displaying Reviews 1 - 10 out of 74

16 of 16 people found the following review helpful:

Monday you can fall apart. Tuesday, Wednesday break my heart (2004-04-21)

★★★★★

by E. R. Bird

We've all heard the stories of the skies, for whatever reason, raining frogs on innocent town travelers. This natural occurrence life. So how much odder is it, really, to consider frogs flying? They have all the self-possession required of such a task....

[read more >>](#)

Sara Ring: MINITEX/BATS

CATALOGING

VENDOR RECORDS IN WORLDCAT

We continue to hear comments from library staff about level 3 records in WorldCat, so we would like to remind library staff of why they are there and the options you have for dealing with them.

In the past year or so there has been some controversy over level 3 MARC records in WorldCat. These are abbreviated records that do not meet Minimal-level cataloging specifications. They have been around for some time for use in special projects, but lately they have become more common as Baker & Taylor and other vendor records are batch loaded into WorldCat.

When searching WorldCat, catalogers or acquisitions staff may discover that the only matches they find are level 3 records. Consequently, they spend time either upgrading these records or creating new ones to avoid the hassle of cleaning up what they did find.

Level 3 records are not intended for cataloging use as they are. Level 3 vendor records have been added to WorldCat in an effort to make records available earlier in the acquisitions process. OCLC is working with Baker & Taylor and other vendors to improve the quality of these records. In the meantime, they are urging cataloging staff **NOT** to create new, duplicate records but to upgrade the level 3 records that are encountered (NOTE: library staff who upgrade these records receive an enhancement credit of \$3.20 for each record).

As another alternative, if you find inadequate level 3 records in WorldCat, you could create a brief record in your local catalog and, then, search WorldCat again in a couple of weeks in the hope of finding better records for your items.

If you have questions about level 3 records in WorldCat, please contact us in the MINITEX Bibliographic and Technical Services staff (Contact information at the end of the Mailing).

Mark Wilhelmi; MINITEX/BATS

RDA FULL DRAFT AVAILABLE FOR COMMENT

The full draft of RDA is now available on the Joint Steering Committee Web site. Look for the link on this page:



<http://www.collectionscanada.gc.ca/jsc/rdafulldraft.html>

The deadline for responses is Feb. 2, 2009, to allow time for the comments to be compiled for consideration by the Joint Steering Committee (JSC) at their meeting in March 2009. To submit comments, see the following Web form: <http://www.libraries.psu.edu/tas/jca/ccda>

Sara Ring; MINITEX/BATS

LOCAL HOLDINGS MAINTENANCE

A SNAPSHOT OF YOUR LOCAL HOLDINGS: THE LHOP

Has it been a while since your library updated its LHRs in OCLC? Have you wondered what other libraries see when they look at your library in OCLC? You don't have to wonder, since OCLC now provides the Local Holdings Offline Product file (LHOP)

Since February over 60 institutions in the MINITEX region have ordered a free OCLC Local Holdings Offline Product file. Each file provides a complete list of the library's Local Holdings Records (LHRs) in OCLC,

which the library can download and use for a number of purposes. The file can be formatted and arranged to provide a printed list of serials, or to use as an online database of holdings information, supplementing the library catalog.

Of course, one of the most likely uses for the file is to make sure that holdings records in OCLC are accurate and 'in sync' with your current holdings. Not only can you check to see that each item in your catalog has the proper holdings in OCLC, you can discover if any items you've withdrawn are still lurking in the OCLC system, or if items you've added locally are included in your OCLC LHRs. Thirteen of the libraries that ordered an LHOP file

LOCAL HOLDINGS MAINTENANCE (CONTINUED)

Continued from page 5

have already ordered another, suggesting that they used the file to update holdings and then ordered another version to see (and perhaps to double-check) the updated LHRs.

If your library has ordered a Local Holdings Offline Product, we'd like to hear about how you are using it. Are you using it to update LHRs in OCLC? What else might you do with this information? Did you find any surprises in the file? Contact Dave in the MULS office if you have questions to ask or stories to tell about your Local Holdings Offline Product.

David Linton, MINITEX/MULS

LOCAL HOLDINGS IMPORTER: A TOOL TO USE WITH LHOP FILES

The Local Holdings Offline Product file from OCLC can be very useful, as noted in the previous article. But, the tab-delimited file you get from OCLC may not be the most useful way to view the complex information the file contains. The OCLC Quick reference guide to the LHOP product tells how to convert the file into an Excel spreadsheet, but, even then, data may not be easy to read in fixed width cells, and the holdings can be many columns removed from the title and other information.

To provide libraries with another way to view their LHOP data, MINITEX developed the OCLC Holdings Importer

– a tool that works with Microsoft Access to create customized reports. Using the OCLC Holdings Importer, a library can reconfigure the data in their LHOP file into three different formats, each with a different level of detail:

- 1) Title list - this report includes just the most basic information: Title, Place of publication, Location and Holdings for each item.
- 2) Summary entry - this report has somewhat more information for each item, adding the OCLC record number and the ISBN/ISSN to the info in the titles list. The format also gives each entry a bit more space on the page, making it easier to read.
- 3) Detailed entry - this report includes all of the above information, and also shows coded fields for the Lending and Reproduction status of the item and a date field that indicates when the LHR was last updated. We expect that this report would be useful primarily to library staff.

To learn more about this tool, or to download it to your computer, you can search the MULS blog for the August entry titled “New utility for Local Holdings” or you can link directly to the blog entry at:

http://blogs.minitex.umn.edu/muls/2008/08/new_utility_for_local_holdings_1.html

If you need help using the importer or have questions about it, contact Dave Linton in the MULS unit.

Dave Linton, MINITEX/MULS

DIGITIZATION & PRESERVATION

WEBINARS ON METADATA AND DUBLIN CORE

If you could not attend the two new webinars “What is Metadata? A Very Basic Introduction” and “Dublin Core for Beginners,” we have scheduled a session of each in January 2009.

What is Metadata? A Very Basic Introduction

Wednesday, January 14, 2009

2:00 PM – 3:00 PM (Central Time)

What, exactly, is metadata and what does it have to do with my digitization project? Is it important? How can I learn more about it? This one-hour Webinar will answer these

questions, and more. You will gain a basic understanding of metadata and why you should care about it.

This webinar is intended for anyone working with digitization projects or digital objects who needs a basic introduction to metadata.

Dublin Core for Beginners

Wednesday, January 21, 2009

2:00 PM – 3:00 PM (Central Time)

Are you involved in a digital project at your institution? How will you describe your digital objects in order to provide online access to them? One option is to use the

DIGITIZATION & PRESERVATION (CONTINUED)

Continued from page 6

Dublin Core, an international metadata standard used to describe digital content. This 60-minute webinar will introduce you to Dublin Core and the 15 basic elements. As we look at several examples, the Western States Dublin Core Metadata Best Practices will be used as a guideline.

This webinar is intended for staff who work in libraries or cultural heritage institutions as catalogers, archivists, special collections librarians, or anyone who has responsibilities for the description of and access to digital collection materials.

Sara Ring; MINITEX/BATS

CONTENTdm FEATURED COLLECTIONS

The featured collections for November are: A Digital Collection Celebrating the Founding of the Historically Black College and University, Archivo histórico de la Real Sociedad Económica de Amigos del País de Gran Canaria, Cuban Postcard Collection, and Milwaukee Historic Photos.

A Digital Collection Celebrating the Founding of the Historically Black College and University (HBCU)

<http://hbcudigitallibrary.auctr.edu>

HBCU Library Alliance

This collection of primary resources from HBCU libraries and archives includes over 1,000 scanned pages and represents HBCU libraries' first collaborative effort to make a historic collection available digitally. Collections are contributed from member libraries of the Historically Black College and University Library Alliance and include photographs, university correspondence, manuscripts, alumni letters, and memorabilia ranging from the early 1800's until today.

Archivo histórico de la Real Sociedad Económica de Amigos del País de Gran Canaria

<http://mdc.ulpgc.es/rseapgc>

Universidad de Las Palmas de Gran Canaria

La Real Sociedad Económica de Amigos del País de Gran Canaria, creada en 1776, es la institución civil no gubernamental más antigua de las Islas Canarias (España, Spain). En 2001, gracias a un acuerdo con la Universidad de Las Palmas de Gran Canaria, se ha digitalizado el Archivo de la RSEAPGC, compuesto por unas 18.000

páginas, fruto de la actividad de esta Sociedad desde su creación hasta 1967, además de recoger numerosos proyectos destinados al bienestar y progreso de Gran Canaria. Entre ellos, cabe destacar los legajos relativos al Puerto de la Luz o al urbanismo capitalino, pasando por el rescate de prisioneros canarios en África o el restablecimiento de la Escuela de Comercio.

English Description: The Royal Economic Society of Friends of Gran Canaria, started in 1776, is the oldest non-governmental, civil institution in the Canary Islands, Spain. Thanks to an agreement with the University of Las Palmas Gran Canaria, some 18,000 pages of its historical archive were digitized. This collection documents the Society's activities from 1776 to 1967 and includes some outstanding historical items—materials related to Puerto de la Luz, the city planning for the capital, the rescue of Canarian prisoners in Africa, and the reestablishment of the School of Commerce.

Cuban Postcard Collection

<http://merrick.library.miami.edu/cubanHeritage/chc0359/>
University of Miami

A selection of over 500 postcards of Cuba and the Cuban experience outside the island produced from the turn of the 20th century to the present. It includes real photo, printed photo, and artist drawn postcards and provides views of the many parts of the island as well as various aspects of Cuban communities in the United States and abroad.

Milwaukee Historic Photos

http://www.mpl.org/file/digital_historicphoto_index.htm
Milwaukee Public Library

The photos from Milwaukee Historic Photos digital collection are pulled from the Milwaukee Public Library's historic photograph collection. The entire collection includes over 50,000 photographs of Milwaukee dating from the late 19th century to present day. The current digital collection is only a small fraction of the total available photos, but is being added to all the time. The photos were donated to the library by individual donors, various city departments, and businesses and corporations.

These are just a few of the many digital collections created by CONTENTdm users. To access the entire Collection of Collections go to:

<http://www.oclc.org/contentdm/collections>

OCLC; edited

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OCLC Local Holdings Maintenance (formerly Union Listing).

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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.

DECEMBER

- 5 Cataloging Options: When Full-Level Records Are Too Much
10:00 a.m. – 11:30 a.m., CST
Online training session
<http://www.minitex.umn.edu/events/training/webinars.asp#153>
- 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>
- 12 MINITEX Policy Advisory Board Council Meeting
9:00 a.m. – 12:30 p.m., CST
15 Andersen Library
222 21st Avenue South
Minneapolis, MN
- 12 Town Hall: "Focus on Tough Economic Times" (second in a series of three webinars)
1:00 p.m. – 2:00 p.m., CST
Online training session
<http://evanced.info/webjunction/evanced/events/signup.asp?ID=1539>
- 15 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>
- 18 Town Hall: "Focus on Tough Economic Times" (third in a series of three webinars)
2:00 p.m. – 3:00 p.m., CST
Online training session
<http://evanced.info/webjunction/evanced/events/signup.asp?ID=1540>

- 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>
- 23-28 ALA Midwinter Conference
Colorado Convention Center, 700 – 14th St., Denver, CO
<http://www.ala.org/ala/conferenceevents/upcoming/midwinter/home.cfm>

OCLC Connexion: Searching WorldCat Quick Reference

OCLC Connexion Interfaces

Use the Connexion client interface (Windows-based software) or the Connexion browser interface (opens in your default browser window).

- To open the client, on the desktop, click **Start > Programs > OCLC Connexion**, or double-click the client icon .
- To open the Connexion browser, open your Web browser and go to <http://connexion.oclc.org>.

Multiscript support in the client only: The following non-Latin scripts are supported in the client for cataloging, searching, etc.: Arabic, Bengali, Chinese, Cyrillic, Devanagari, Greek, Hebrew, Japanese, Korean, Tamil, and Thai.

Enter Command Line or Guided Search/Browse

Search—Client or browser

Open the Search WorldCat client window or browser screen:

Step	Action
1	<p>Client: Click Cataloging > Search > WorldCat, or click , or press <F2>.</p> <p>Browser: Click the Cataloging tab > Search > WorldCat, or press <Ctrl><Shift><W>.</p>
2	<p>Enter a complete search or browse in correct search syntax in the Command Line Search box.</p> <p>Type any of these search types:</p> <ul style="list-style-type: none"> Numeric Keyword Derived Browse (scan an index) <p>Or</p> <p>Enter a guided search in parts in the Keyword/Numeric area and select an index using text boxes and drop-down lists. Let the system create the correct search syntax.</p> <p>Enter any of these search types:</p> <ul style="list-style-type: none"> Numeric Keyword Derived search term (no browse) <p>For details, see the next section, "General Guidelines"</p>

Tip: Collapse or re-expand the Search WorldCat window or screen to show only the Command Line or show the full window/screen:

- Client:** Click **Expand/Collapse**.
- Browser:** Click the plus or minus button:  or .

Quick search: Client only

Use the WorldCat Quick Search box on the toolbar to enter a command line search or browse:



Guided browsing—Client or browser

Open the Browse WorldCat client window or browser screen to enter a guided browse term:

Step	Action
1	<p>Client: Click Cataloging > Browse > WorldCat, or click , or press <F2>.</p> <p>Browser: Click the Cataloging tab > Browse > WorldCat, or press <Ctrl><Shift>.</p>
2	Enter a browse term in the Browse for box.
3	Select an index from the adjacent list

For details, see the next section, "General Guidelines."

Batch process searches—Client only

Step	Action
1	Click Batch > Enter Bibliographic Search Keys , or press <Alt>.
2	Select a local file to store searches (default: DefaultBib.bib.db).
3	Select an index from the adjacent list
4	Enter a numeric, keyword, or derived search in the Query box, using full search syntax (same as command line search syntax).
5	Click Add or press <Enter>
6	When finished, click Save .
7	When ready, run batch processing (Batch > Process Batch).

General Guidelines

Command line (full syntax) search or browse

For a command line search (a complete search in a single string):

- Precede a browse term with the Scan command (**sca**) followed by a space, but use no command for a search.
Example of browsing: sca ti:roots
- Include index labels followed by correct punctuation to indicate a word, phrase (subfield data) or whole phrase (field data) form of the index.
 - Use a two-letter index label and a colon (:) for word indexes.
Example: ti:nexus
 - Use a two-letter index label and an equal sign (=) for phrase indexes.
Example: ti=connected islands new and selected*
 - Use a three-letter index label ending in the letter **w** and an equal sign (=) for whole phrase indexes
Example: pnw=woolf, leonard 1880-1969
 - **Exceptions.** Index labels are optional for:
 - Derived search if it is the first or only search term
 - ISBN search if it is the first or only search term
 - OCLC number search, if preceded by an asterisk (*) or number sign (#)
- **Options**
 - Type Boolean operators **and**, **or**, or **not** to combine multiple terms in different indexes.
 - Type proximity operators **with (w)** or **near (n)** with numbers (1 to 25) to find multiple terms in one index that have a specified number of intervening words.
 - Include only one qualifier of any one type.
 - Use slashes or index labels for format, year, microform, or source qualifiers
 - Use index labels only (cannot precede with a slash) for Internet/non-Internet or language qualifiers
 - Include only one qualifier of any one type.
 - Type symbols for wildcards (# or ?) and truncation (*) in place of characters to retrieve different forms of a word. (Available for Latin script searches only.)
Note: Precede symbols by at least three characters.
- **Client only—no separate indexes for non-Latin script search terms:** Use the same indexes, operators, and qualifiers as for Latin script searches. Enter search terms in Latin script.

Guided search or browse

For a guided search hen (entered in parts; system creates the syntax):

- In the Search WorldCat window or screen, type a keyword, numeric, or derived search term in any **Search for** box.
- **Optional.** Type multiple search terms in a single box to combine a search in a single index. Between terms, type:
 - Operators **and**, **or**, or **not**
 - Operators **with (w)** or **near (n)**. **Optional:** Add numbers (1 to 25) to specify the number of intervening words
- Select an index from the adjacent list.
- **Other options:**
 - Type search terms in additional **Search for** boxes and select **and**, **or**, or **not** from lists to combine a search in a different index.
 - Type symbols for wildcards (# or ?) and truncation (*) in place of characters or endings in a search term to retrieve different forms of a word.
Note: Precede symbols by at least three characters.
 - Select or enter qualifiers in lists or boxes.

Tip: Switch between long and short selection lists:

- **Client:** Click plus (+) or minus (-) to expand or shorten index, material type, or language lists.
- **Browser:** Click More Indexes or Fewer Indexes or click More Material Types or Fewer Material Types to expand or shorten index or material type lists.

Note: All search examples and guidelines in this Quick Reference are in command line format (full syntax) only.

Words, phrases, and whole phrases

Index	Searches for ...	Examples
Word	Word or number anywhere in a field	pn:stansbury dd:151
Phrase	Words in a single subfield from the beginning, in sequence, including all subfield data	pn=james, henry pb=Pearson Addison Wesley
Whole phrase	All words in a field in sequence from the beginning, including all data across indexed subfields.	pnw=james, henry 1843-1916 sew=poetry in public places
Notes:		
<ul style="list-style-type: none"> • When using a word index, to find records with an exact sequence of multiple words, enclose in quotation marks ("). Example: ti:"asian crisis" • Omit initial articles in titles for phrase and whole phrase searching. • Truncate a phrase or whole phrase using an asterisk (*), or use browsing for automatic truncation. • You can use the truncation symbol (*) for Bengali, CJK, Devanagari, Tamil, and Thai script searching only, not for other scripts. 		

Search Formats

Numeric searches

Guidelines

- **Command line numeric searches:** Always precede search term with an index label and punctuation (a colon (:)) for numbers or an equal sign (=) for number phrases).
Exception: ISBN does not require label if it is first or only search.
- Type all numbers and letters, including ISBNs, government document numbers, and publisher numbers (formerly music publisher).
Tip for entering ISBNs ending in x: If you use the number keypad, truncate the number using the asterisk (*) key.
- Omit spaces.
- In class number searches:
 - Include periods. **Example:dd:616.46**
 - Omit all other punctuation in class numbers.
 - Omit spaces
- See notes in the following tables on the treatment of hyphens in ISBN, ISSN, and LCCN searches.

Numeric indexes and search examples

ISBN index	To search for ...	Enter ...
Label = bn :	0-85109-130-x	085109130x or bn:085109130x
	0-8247-7142-7	0824771427 or bn:0824771427
Notes: <ul style="list-style-type: none"> • Use index label if number is not first search in command line. • Omit hyphens if no index label; omit or enter hyphens with index label. 		

ISSN index	To search for ...	Enter ...
Label = in :	1234-5678	in:1234-5678
	0018-165x	in:0018-165x
Note: Always include hyphens.		

LCCN index	To search for ...	Enter
Label = In :	map32-14	In:32000014 or In:32-14
	2002-580246	In:2002-580246 or In:2002580246
Notes: <ul style="list-style-type: none"> • Enter with or without hyphen. • Include year portion (2 or 4 digits). • Use a circumflex (^) to exclude LCCNs that have prefixes. 		

Government document number index	To search for ...	Enter ...
Label = gn :	a 1.2:R31/14/984	gn:a12r3114984
	NAS 1.2:SP1/46	gn:nas12sp146
Notes: <ul style="list-style-type: none"> • Enter all numbers and letters. • Omit punctuation. 		

OCLC control number index	To search for ...	Enter ...
OCLC control number (no):	10998406	no:10998406 or *10998406 or #10998406
Notes: <ul style="list-style-type: none"> • Command line/full syntax search: Precede with index label, asterisk (*), or number sign (#). • Keyword/Numeric guided search: Optional. Precede with * or # instead of selecting an index. Do not use the index label. 		

Publisher number indexes	To search for ...	Enter ...
Number label = mn :	CO 1979-AB5-1	mn:co1979ab51
	Note: Formerly called music publisher number.	
Number phrase label = mn=	BBC 001	mn=bbc 001
	Note: You can include spaces in a phrase search.	

Keyword searches

Guidelines

- For searches of the Access Method index (**am**: or **am=**)
 - Omit *http*: and *https*:
 - Treat punctuation marks as word divisions.
 - Include stopwords for this index.
Example: am:his
- Internet qualifier (**mt**:) limits results to:
 - Internet-only resources = records with field 856 and second indicator <blank>, 0, or 1. In the **Command Line**, type **mt:url** Or
 - Non-Internet resources = all other records. Type **not mt:url**.

Keyword index stopwords

The system ignores the following common words in a keyword search:

a	be	has	in	of	that	was	you
an	but	have	into	on	the	were	
and	by	he	is	or	their	when	
are	for	her	it	she	there	which	
as	from	his	its	so	this	with	
at	had	if	not	than	to	would	

To use a stopword in a search, enclose in quotation marks.

Example: To search for the title *And Then There Were None*, type: **ti:"and" then "there" "were" none**

Selected keyword indexes and search examples

Keyword index	Label	Example
Corp/Conf Name	cn:	cn:enron
Corp/Conf Name Phrase	cn=	cn=enron corp
Corp/Conf Name Whole Phrase	cnw=	cnw=enron corp board of directors special investigative committee
Name	au:	au:kahlo
Name Whole Phrase	auw=	au=kahlo, frida 1910-1954
Personal Name	pn:	pn:salinger j d
Publisher	pb:	pb:thousand oaks
Series	se:	se:ergonomic
Series Phrase	se=	se=ergonomic management series
Subject Phrase	su=	su=aquatic ecosystems
Title	ti:	ti:gerontological
Title Phrase	ti=	ti=gerontological nursing

Derived searches

Derived search key limits

Derived index	Label	Minimum key	Maximum key
Personal Name	pd:	4,1,blank	4,3,1
Corp/Conf Name	cd:	=4,1,blank	=4,3,1
Name/Title	nd:	4,4	4,4
Title	td:	none	3,2,2,1
Notes:			
<ul style="list-style-type: none"> For records without 1xx fields, the minimum search key can be blank,4. Even if data has fewer than the required number of words, type all required commas. Example: To find <i>Roots</i>, type td:roo,,, or roo,,, 			

Guidelines

- Omit index label if first or only search in the command line.
- Omit initial articles (*a, an, the*, and non-English equivalents).
- Include articles within titles.
- Include letters and numbers.
- Exclude all other characters, including diacritics and punctuation.
- Use a circumflex (^) to narrow a search. (Do not use the circumflex in a derived title search.)
Example: **pd:harv,hen,^** or **harv,hen,^**
- If followed by lowercase letter, include *c* or *ac*.
Examples: For *MacDonald, Marion B.*, type **pn:mdon,mar,b**. For *Macdonald, Andrew T.*, type **pd:macd,and,t**.
- For compound or hyphenated surnames, treat all parts of a name up to the first comma as the first derived search element.
Example: For *Li-Marcus, Moying*, type **pd:lima,moy,**.
- For forenames only, treat each part as separate segments. Treat each part of a hyphenated forename as separate.
Examples: For *White Bull*, type **pd:whit,bul,**. To find *Li-Min Tau*, type **pd:li,min,t.**
- Do not use non-Latin scripts in derived searches.

Derived search stopwords

Omit the following words from the first segment of a corporate/conference name when you use the **cd:** and **nd:** indexes. Otherwise, include the words.

&	Commonwealth	Institute	South
a	Conference	International	State
American	Congress	Joint	Subcommittee
an	Council	Meeting	Symposium
and	Department	National	the
Association	Dept.	North	U.N.
at	Division	of	U. N.
Australia	East	Office	United Nations
Board	Federal	on	United States
Bureau	for	Organization	University
Canada	France	Parliament	U.S.
College	Great Britain	School	U. S.
Colloquium	House	Seminar	West
Commission	in	Senate	Workshop
Committee	India	Society	All names of U.S. states

Examples of omitting initial stopwords

Omit initial stopwords in a search for ...	Enter search as ...
Corporate author: <i>Great Britain Forestry Commission</i> of map(s) published in 1985	cd:fore,com,1985
Corporate author: <i>United Nations Committee on Economic, Social and Cultural Rights</i>	cd:econ,soc,a
Corporate name and title: <i>Indiana Supreme Court</i> [name] and <i>Race and gender fairness</i> [title]	nd:supr,race

Browse (scan an index)

Browsing matches your term or phrase character by character, from left to right, against characters in the index you specify.

Guidelines

- Include up to 60 letters, numbers, spaces, or these characters: () # &
- Omit initial articles (*a, an, the*, and non-English equivalents) from browse terms.
- Include hyphens or substitute a space.
- Type any word to browse a word index (need not be the first word); the system matches any instance of the word in indexed fields/subfields.
- Begin a phrase or whole phrase with the first word in a field or subfield (exclude initial articles). The system matches the exact term, beginning with the first word in sequence across indexed fields/subfields.
- Use the title whole phrase index (**tiw=**) to browse for a title proper, or cataloger-constructed title access point. The index **excludes** 245 ‡b.
- Use the title phrase index (**ti=**) to browse for title/subtitle combinations. The index **includes** 245 ‡b.
- Browsing provides automatic truncation. Type only as many characters or words as needed.
Example: For the title *Let Us Now Praise Famous Men*, type **sca tiw=let us now praise**
- Do not combine terms or use qualifiers, truncation, or masking for browsing.
- If you copy text across subfields in a record and paste as a browse term, remove delimiters, subfield codes, and punctuation.
- If you are unsure of an exact browse term, use a keyword search instead.

Selected browse indexes and examples

Index	Label	Example
Corp/Conf Whole Phrase	cnw=	sca cnw=hershey chocolate
Dewey Class Number	dd:	sca dd:151
LC Class Number	lc:	sca lc:z5063.2.a2
Name Whole Phrase	auw=	sca auw=dewey, melvil
Personal Name Whole Phrase	pnw=	sca pnw=james, henry 1843-1916
Publisher Phrase	pb=	sca pb=macmillan
Series Whole Phrase	sew=	sca sew=literacy 2000
Subject Whole Phrase	suw=	sca suw=library science
Title Whole Phrase	tiw=	sca tiw=birds and beasts
Uniform Title Whole Phrase	utw=	sca utw=concertos f 44 f major

Combine, Qualify, or Expand Searches

Use qualifiers, Boolean and proximity operators, and wildcard and truncation symbols to limit, combine, focus, or expand searches.

Qualifiers

Add qualifiers to limit search results.

Qualifier (label)	You type ...
Type/Format (mt:)	/bks or mt:bks (Books) /com or mt:com (Computer Files) /cnr or mt:cnr (Continuing Resources) /map or mt:map (Maps) /mix or mt:mix (Mixed Materials) /sco or mt:sco (Scores) /rec or mt:rec (Sound Recordings) /vis or mt:vis (Visual Materials) Note: You can also use: <ul style="list-style-type: none"> • /ser or mt:ser (Serial) • /int or mt:int (Integrating resource) (The broader continuing resources index (cnr) listed above includes these formats.)
Year(s) of publication (yr:)	Single year (example: /1980 or yr:1980) Decade (example: /198? or yr:198?) Century (example: /19?? or yr:19??) Single year and all following years (example: /1980- or yr:1980-) Single year and all previous years (example: /-1980 or yr:-1980) Range of years (examples: /1980-3 or /1980-93 or /1880-921 or /1990-2005 or precede with an index label instead of a slash) Unknown dates (code <i>u</i>) (example: for Date1 value <i>19uu</i> , type /1900 or yr:1900) No date: Enter zeroes (example: /0000 or yr:0000)
Microform/not microform (mf:)	/mf or mf:mic (microform) /nm or mf:nmc (not microform)
Source (dl:)	/dlc or dl:y (records contributed by Library of Congress/Program for Cooperative Cataloging) Note: Use the Cataloging Source phrase index (cs=) with an OCLC symbol to find records contributed by a specific library.
Internet/non-Internet (mt:)	mt:url (Internet resources only) not mt:url (exclude Internet resources)
Language (la:)	Index label followed by language name or MARC code Example: la:english or la:eng

Qualifier guidelines

- Use **slashes or index labels** for format, years, microform, or source qualifiers. Use **index labels only** for Internet/non-Internet and language qualifiers.
- Use only one qualifier of each type per search.
- Slash qualifiers must appear at the end of a search. Qualifiers with index labels can appear anywhere in a search.
- Type qualifiers in any order.

Operators

Use Boolean and proximity operators to combine search terms in various ways.

Operator	What the operator does
and	Finds all terms anywhere in a record. Example: su:wom?n and ti:history and gc:new york and yr:1970-
or	Finds any single term or all terms. Example: pn=woolf, virginia or pn=woolf, leonard and yr:1900-50
not	Excludes the term that follows not. Example: ti:civil war not su:battle not gc=united states
with (w)	Finds records containing both terms, in the order typed, or if followed by a number (1 to 25), finds records with no more than the specified number of words between the terms. Examples: ti:aluminum w wiring or alternatively, enclose the phrase in quotation marks: ti:"aluminum wiring" Or ti:aluminum w2 wiring
near (n)	Same as for with, except that the words can be in any order. Examples: ti:moon n eclipse or ti:chicken n3 egg

Operator guidelines

- Do not use **and, or, not, with, or near** for browsing.
- Do not use **with** or **near** for derived searching.
- To use **and, or, not, with, or near** as a keyword in a search, enclose the word in quotation marks to prevent the system from treating it as an operator.
Example: To search for the title *Neighbors Near and Far*, type ti:neighbors "near" "and" far.
- Type the maximum number of characters in the segments of combined derived searches (see the "Derived search key limits" table above).
- Qualifiers apply to all parts of combined searches.

Truncation and wildcard symbols

Use truncation and wildcard symbols to expand or focus search results.

Truncation	How to use
* (asterisk)	Place at the end of a word to retrieve variant endings Example: invest* retrieves investor, investment, investment fraud, etc.

Wildcard	How to use
#	Place at the end of a word to retrieve variant endings. Example: invest# retrieves investor, investment, investment fraud, etc.
?	Replace multiple unknown characters in a word Example: emp?e retrieves empire, empale, emphasize, and emplace
?n	Specify the number of characters to replace (n=number of characters, 1-9) Example: str?3 retrieves street, stream, streak, stride, strait, string, etc.

Truncation and wildcard guidelines

- **Limitation:** Precede symbols by at least three characters.
- **Non-Latin script searches:** Truncating searches is supported for Bengali, CJK, Devanagari, Tamil, and Thai script search terms only. For other scripts, use browsing for automatic truncation.

Search examples

The following examples compare keyword/numeric search format with derived search format for the same search:

Keyword/numeric search	Derived search
au:rendell, ruth or au:vine, barbara	rend,rut, or vine,bar, Or pd:rend,rut, or vine,bar,
au:cervantes/1970-80/vis Or au:cervantes and mt:vis and yr:1970-80	cerv,mig,d/1970-80/vis Or pd:cerv,mig,d and yr:1970-80 and mt:vis
au:camus and ti:etranger and la:french	pd:camu,alb, and td:etr,,, and la:french

More examples of qualified, combined, and expanded searches:

su:scotland and mt:map and yr:2000-
 cn:microsoft and yr:2003 not mt:url
 su:civil and war not battle/1970
 dd:880 and la:eng/bks/1960-70
 ti:bring w2 bacon
 gon,wi,th,w/bks/19??/mf/dlc or td:gon,wi,th,w/bks/19??/mf/dlc
 =adri,col,/bks/1970-90 or cd:adri,col,/bks/1970-90

Qualify searches by specific material types

To qualify searches by material type, use a word or phrase qualifier index label (**mt:** or **mt=**) with the 3-letter code or name for a material type, as shown in the tables below (names are not case-sensitive).

Example: To find *The Sound of Music* in CD audio only, type:
sou,of,mu, and mt:cda or **sou,of,mu, and mt=cd audio**

Codes and names are organized alphabetically by name within each qualifier group in the tables below.

Code	Name	Code	Name
Universal types: Books (mt:bks or /bks) and Mixed Materials (mt:mix or /mix)			
shs	Adolescent	lgp	Local government publication
arc	Archival material	mss	Manuscript
acp	Article	mmc	Master microform
bio	Biography	mcd	Micro-opaque
brl	Braille	mfc	Microfiche
cnp	Conference publication	mfl	Microfilm
elc	Electronic	ngp	National government publication
fic	Fiction	ejh	Pre-adolescent
gpb	Government publication	pre	Preschool
igp	International government publication	pri	Primary school
juv	Juvenile (includes all juvenile types)	sgp	State or province government publication
lpt	Large print	web	Web access
Sound recordings (use mt:rec or /rec)			
45s	45 rpm	msr	Musical recording
78s	78 rpm	nsr	Non-musical recording
cas	Cassette	rll	Roll
cda	CD audio	rtr	Reel-to-reel tape
dva	DVD audio	wxc	Wax cylinder
lps	LP	wrr	Wire recording
mp3	MP3		
Visual materials (use mt:vis or /vis)			
ngr	2-D image	oar	Original artwork
art	3-D object	pal	PAL
anm	Animation	pan	Partial animation
rep	Artwork reproduction	pht	Photograph

Code	Name	Code	Name
Visual materials, continued			
bta	Beta	pic	Picture
cht	Chart	pgr	Projected image
dio	Diorama	rbj	Real object (realia)
dvv	DVD video	scm	SECAM
mot	Film	sld	Slide
flm	Filmstrip	tch	Technical drawing
crd	Flash card	toy	Toy
gam	Game	trn	Transparency
grp	Graphic	vhs	VHS
kit	Kit	vca	Videocassette
msl	Microscope slide	vdc	Videodisc
mdl	Model	vid	Videorecording
Maps, cartographic materials (mt:map or /map)			
atl	Atlas	mcm	Manuscript map
cgl	Celestial globe	mmp	Model map
egl	Earth globe	pgl	Planetary globe
gsc	Geological section	pcm	Published map
glb	Globe	rsi	Remote-sensing image
Musical scores (use mt:sco or /sco)			
mmu	Manuscript music	pmu	Published music
Continuing resources (use mt:cnr or /cnr)			
*int	*Integrating resource	*ser	*Serial
new	Newspaper	upd	Updating database
per	Periodical	upl	Updating loose-leaf
mse	Series	upw	Updating website
Computer files (use mt:com or /com)			
312	3.5 in. disc	fnt	Font
514	5.25 in. disc	imm	Interactive multimedia
bdt	Bibliographic data	ndt	Numeric data
cdc	CD for computer	oss	Online system or service
cgm	Computer game	pgm	Program
cig	Clipart images graphics	snd	Sound effect
dct	Document		

*For integrating resource (**int**) and serial (**ser**) material types only, you can EITHER precede with **mt:** or **mt=** OR add to the end of a search as a slash qualifier (**/ser** or **/int**), as you can for the main qualifiers.

More Information

- For comprehensive information on WorldCat search indexes, see:
 - [Searching WorldCat Indexes](#)
- For using the Connexion client, see:
 - [Connexion Client System Guide: Search WorldCat](#)
 - [Searching WorldCat tutorial](#) (for the client)
- For using the Connexion browser, see:
 - [Connexion Browser System Guide: Find Bibliographic Records](#)
 - [Searching WorldCat tutorial](#) (for the browser)

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- **Client:** Click **Help** > **Contact Support**.
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