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ANNOUNCEMENTS

OCLC Events at ALA

Get the latest information on OCLC services and programs at the ALA Annual Conference in Washington, D.C. More than 35 special OCLC sessions and meetings are planned, including a WebJunction member reception, the popular OCLC Update Breakfast and a symposium on "Is the Library Open?"

Demonstrations at OCLC Booth #1725 will feature WorldCat.org, WorldCat Collection Analysis, contract cataloging services, NetLibrary eContent, WorldCat Resource Sharing, Connexion, virtual reference services, and digital collection and preservation services.

You can register online for these OCLC events by visiting the following Web page:
<http://www.oclc.org/info/ala/>

MINITEX staff will also be present at many of these meetings, and we plan to report back through *MINITEX/OCLC Mailing* articles when we return. We hope to see you there!

OCLC; edited

GENERAL

OCLC WorldCat Local – A Centralized Discovery Tool

These days library users are no longer satisfied with being able to search for different types of resources through different search platforms. As was discussed earlier this year at the Ex Libris User Group Meeting and the MINITEX Interlibrary Loan Conference, users want to find everything in one place, and developers are rushing to create services that will give them what they want.

OCLC will soon introduce WorldCat Local -- a new service that will enable library users and staff to access their own collections, WorldCat, and article databases through their own customized local view of WorldCat.org.

WorldCat Local will provide users with the ability to search the entire WorldCat database and display results beginning with the items that are most accessible to them -- such as collections from your library, collections shared in a consortium, and open access collections -- through a single search box on your library interface. In addition, it will work with locally maintained services like circulation, resource sharing and linking to full text.

WorldCat Local builds on WorldCat.org which provides Web access to materials held in libraries. The test version has such features as cover art, faceted browse capability, evaluative content, result sets that bring multiple versions of a work together under one record, citation formatting options, and relevancy ranking of search results. In the future, OCLC will add enhancements like social networking services and more than 30 million article citations.

Libraries around the country are currently testing WorldCat Local, and several Minnesota academic libraries are considering it. If you would like to get a feel for how WorldCat Local works, try searching the University of Washington Libraries at:
<http://www.lib.washington.edu/>

OCLC; edited, Mark Wilhelmi, MINITEX/BATS

CATALOGING & METADATA

MARC Record Changes: What's the Latest?

Last month, OCLC issued *Technical Bulletin 254*, which outlines a number of changes to OCLC MARC records. It is always a good idea for catalogers to be aware of what is going on with the MARC record and some of these changes could affect local system processing of OCLC-MARC records. I highlight a few of these changes below, and I urge you to take a look at the full Technical Bulletin at:

<http://www.oclc.org/support/documentation/worldcat/tb/254/default.htm>

Bibliographic Record Changes

There are changes to quite a few existing MARC fields plus the addition of new fields. I'm giving you only a taste of the changes here.

Field 020 International Standard Book Number

Subfields **a** and **c** are no longer repeatable. Separate 020 fields are now required and OCLC has already corrected all 020s with multiple subfields **a** by creating separate 020 fields.

Field 041 Language Code

First indicator value of [blank] (for undefined) is no longer valid. Do not use.

Field 049 Series Statement

First indicator value of [blank] (for undefined) is no longer valid. Do not use.

Field 590 Local Note

Now has new 1st indicator values and a new subfield (subfield **8** for field link and sequence number)

Many changes in the 6XX range:

New subfields and new 2nd indicator values.

Six new fields:

- 662 Subject Added Entry – Hierarchical Place Name
- 695 Added Class number

Note: This was formerly field 699

- 696 Local Subject Added Entry – Personal Name
- 697 Local Subject Added Entry – Corporate Name
- 698 Local Subject Added Entry – Meeting Name
- 699 Local Subject Added Entry – Uniform Title

Note: This field has been redefined. Use field 695 for data formerly entered in field 699

Four new Local Added Entry fields:

796 (Personal Name), 797 (Corporate Name), 798 (Meeting Name), and 799 (Uniform Title)

Field 851 (Location) has been restored.

Four new Local Series Added Entry fields:

896 (Personal Name), 897 (Corporate Name), 898 (Meeting Name), and 899 (Uniform Title)

New 9XX fields: 901-907 Local Data Element

Locally defined.

These changes are being incorporated into the online version of *Bib Formats and Standards* (see the article on page 4 of this *Mailing*). You will already see some of the corrections and additions, and the remaining changes will be there by the end of the year.

Institution Records

Some of the changes in the OCLC-MARC bib format coding and practice were made to accommodate RLG practices and most notably, the integration of RLG bibliographic “cluster” records. RLG’s cluster records have become OCLC Institution Records (IRs).

You will be hearing more about Institution Records as time goes on, but here is the gist of the matter. An Institution Record (IR) is a member’s own version of the master record, with all their edits and local information. Each IR is linked to a master record by way of an 079 field that contains the OCLC number of the master record. IRs can be searched and viewed by anyone. However, to begin with, only former RLG members may add IRs. Soon this option will be available to any OCLC full governing member for an extra fee.

What does this mean for you? Well, you can completely ignore Institution Records and continue to search for and use records in WorldCat just as you have always done. Or, if you are curious,

you can view the IRs that are attached to a master record. You might try to find an alternate call number, for example.

Institution Records for the former RLG members are currently being added to WorldCat. You can already view them through the Connexion Browser interface. They will be available in the next version of Connexion Client, version 2.0, which is expected to be released in late June.

You can learn more about Institution Records in *Technical Bulletin 254* (look under "RLG Changes"):

<http://www.oclc.org/support/documentation/worldcat/tb/254/default.htm>

Virginia Dudley, MINITEX/BATS

Blog of the Month: Coyle's Information

Featured Blog

If you are interested in reading about reactions to RDA (the proposed successor to AACR2) in the library community and such topics as copyright in the digital age (to name one of many), then you should check out Karen Coyle's blog at:

<http://kcoyle.blogspot.com>

Karen Coyle wrote an article last January with co-author Diane Hillmann entitled "Resource Description and Access (RDA), Cataloging Rules for the 20th Century" (*D-Lib Magazine*, January/February, 2007. v. 13, n. 1/2), that was critical of the direction in which RDA was headed. Read her updated comments on the blog by looking at the May 2007 article, "Astonishing announcement: RDA goes 2.0." The blog also has quite a few readers who comment back and forth on topics.

Glossary of Terms

Blog – short for Weblog, a blog is a web-based publication that consists of regularly updated articles, usually found in reverse chronological order. "Authoring a blog, maintaining a blog, or adding an article to an existing blog is called **blogging**. Individual articles on a blog are called 'blog posts,' 'posts' or 'entries'. A person who posts these entries is called a **blogger**" (Definition found at: <http://en.wikipedia.org/wiki/Blog>).

Sara Ring, MINITEX/BATS

OCLC Bibliographic Formats and Standards Update

OCLC is updating all of the chapters in the online *Bibliographic Formats and Standards*. Our own Virginia Dudley from the BATS unit is helping to edit some of the content! Chapters 1-5 have been updated, along with the following fields: 2XX, 3XX, 4XX, 9XX. When the online version is complete, OCLC will offer print copies for \$40.00, to be printed sometime in late 2007.

Sara Ring, MINITEX/BATS

OCLC's xISBN Service

Have you heard about this OCLC service? xISBN began as an OCLC Research project and has been available at no charge for individual, non-commercial use since Feb. 2007. It is a machine-to-machine service that takes its information from WorldCat. The service helps a user find additional resources when any ISBN assigned to any printing or edition of the work is known. Users submit an ISBN to the service and receive a list of related ISBNs and selected metadata.

ISBNs are related to each other using librarian-cataloged bibliographic records in WorldCat. These WorldCat records have had an algorithm applied that implements the FRBR conceptual model for information objects, which brings multiple versions of a source work together under one record. The FRBR model keeps WorldCat users from having to browse numerous records that represent many different manifestations of a book—such as different printings, hardcover or paperback editions, audio books or film versions.

xISBN is ideal for Web-enabled search applications, such as library catalogs and online booksellers. Below are some ways xISBN can be used:

- Help users of an online bookseller (such as Amazon) first determine if the book is available at their local library
- Confirm that no alternative versions of a work are available before a library sends an interlibrary loan request
- Use a single search to check holdings of all editions of a work before making a selection for acquisition

Use of the service is free for up to 500 searches, and after that there are charges. More information about the xISBN service, including subscription pricing and an order form, is available at:

<http://worldcat.org/affiliate/webservices/xisbn/app.jsp>

For additional details about the xISBN service contact:
xisbn-support@oclc.org

OCLC; edited, Sara Ring, MINITEX/BATS

LOCAL HOLDINGS MAINTENANCE

Summer LHR projects and MULS Training

As we head into summer, many of us find there is a different rhythm that comes with the new season. While public libraries may find there is extra demand for services for school age patrons and "beach reading material," academic libraries may find grad students and professors eager to make the most of the summer semester.

For some of our MULS participating libraries, summer is an opportunity to catch-up on annual updates to their Local Holdings Records, or to take on weeding projects that might effect their holdings. Whatever you might be doing with your Local Holdings, we at MINITEX would like to know what you are planning to do and if there is any way we can help.

If your library needs help with updating holdings – getting a list of the current titles in OCLC to work with or perhaps setting up a Constant Data file with a generic holding statement – the MINITEX MULS staff will be glad to assist you. If you would like to get your holdings up-to-date, but don't have the staff time, you could consider using the **MULS Updating Service** to help your project along.

Or if your staff has the time, but wants some training on working with Local Holdings Records in OCLC Connexion, we would be happy to schedule training sessions during the summer months. Let us know what you would like to do and what level of training your staff needs - be it basic training on LHR updating, a refresher on certain topics, or a new look at working with complex holdings. We are willing to provide the training you need, and will work to schedule it around your summer activities.

If you have any questions or suggestions, please contact Dave Linton (Contact information at the end of this *Mailing*).

Dave Linton, MINITEX/MULS

User Group Meeting at ALA Annual

Join OCLC for the Local Holdings Users Group meeting at the American Library Association 2007 Annual Meeting in Washington DC. The session will be: Sunday, June 24th, 2:30 p.m. - 3:30 p.m. at the Hyatt Regency on Capitol Hill, Columbia B Room. This group has been known as the OCLC Union List Users Group, but the name has been changed to reflect OCLC's growing emphasis on local holdings information of all kinds.

The agenda for the meeting includes:

- A presentation by Allen Ashman from the Kentucky Union List of Serials who will talk about how he is working with some of the member libraries to use the Lender Reason for No report to assist with Local Holdings Record maintenance activities.

- A discussion on the batch Local Holdings Record Updating service process. We will be soliciting your input on ways to enhance the process and service.

You can register for this session on the OCLC Web site at:
https://www3.oclc.org/app/ala_registration

OCLC; Myrtle Myers, Product Manager, Holdings & Local Data

RESOURCE SHARING

Input at ALA on the OCLC Policies Directory

Are you going to ALA in June? Join OCLC at the ALA Annual Conference to share your views on what information you need as a user of the Policies Directory and learn of upcoming changes. Sessions are scheduled as follows:

- Saturday, June 23, 1:00 pm – 2:30 pm, Grand Hyatt Washington, OCLC Red Suite
- Sunday, June 24, 2007, 11:00 am – 12:30 pm, Grand Hyatt Washington, OCLC Blue Suite
- Sunday, June 24, 3:00 pm – 4:00 pm, Grand Hyatt Washington, OCLC Red Suite

Seating is limited, so reserve your seat now by sending an email by June 15th to:
tostephenk@oclc.org

OCLC; Gabriella Holland

REFERENCE

OCLC FirstSearch: The Basics

Attached to this month's *Mailing* is a print copy of the new document, "OCLC FirstSearch: The Basics." This 8-page quick guide provides a point of reference for the new or experienced FirstSearch user. It also gives library staff the basics on effective use of the FirstSearch WorldCat user interface, the administrative module (including WorldCat Resource Sharing settings), and OCLC Usage Statistics. Some sample sections are:

- Searching
- Selecting a Database
- Search Results
- The Administrative Module
- OCLC Usage Statistics
- Support for FirstSearch Users

OCLC FirstSearch: The Basics is also available online in PDF format at:

<http://www.oclc.org/support/documentation/firstsearch/using/basicrefcard/FSbasics.pdf>

OCLC; edited

Contact Information

MINITEX Bibliographic and Technical Services (BATS), 612-624-4002, 800-462-5348, mino@othello.minitex.umn.edu (Carla Dewey Urban, Virginia Dudley, Carlos Portillo, Sara Ring, Mark Wilhelmi)

OCLC Cataloging, ILL, Digitization and Preservation products and services

MINITEX Contract Cataloging Program (ConCats), Edward Swanson, Manager, 612-624-4002, 800-462-5348, ConCats@tc.umn.edu

MINITEX Cooperative Purchasing & Electronic Resources Services (CPERS), Rita Baladad 612-626-8252, balad001@umn.edu and Ed Keane, 612-624-2925, keane022@umn.edu

OCLC Reference products and services

Cecelia Boone, 612-624-6353, 800-462-5348, c-boon@umn.edu and Dave Linton, 612-624-3360, 800-462-5348, linto001@umn.edu

OCLC Local Holdings Maintenance (formerly Union Listing), including MULS

MINITEX Calendar of Training, Meetings, and Conferences

June 2007

(Updated June 4, 2007)

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.

JUNE

- 6 Webinar - Cataloging Options: When Full-Level Records Are Too Much
11:00 a.m. – 12:00 noon, CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#153>
- 11 5th Annual Digital Library Meeting
9:15 a.m. - 3:00 p.m.; Registration from 8:45-9:15 a.m., CST
Haehn Campus Center, College of St. Benedict
St. Joseph, Minnesota
http://www.mndigital.org/news_events/news_events.htm#2007annual
- 12 Webinar - Introduction to Using OCLC Resource Sharing Statistics
10:00 a.m. – 11:00 a.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/oclc/#143>
- 12 Webinar - Cataloging Options: When Full-Level Records Are Too Much
11:30 p.m. – 12:30 p.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#153>
- 13 Webinar – Web Page Creators: Free of Cost & Code
10:00 a.m. – 11:00 a.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#150>
- 15 Webinar - ELM Overview Webinar
12:00 p.m. – 1:00 p.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#63>

JUNE continued

26 Webinar - ELM Overview
9:00 a.m. – 10:00 a.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#63>

21-27 American Library Association's Annual Conference - Washington, DC
Washington Convention Center, located at 801 Mount Vernon Place, NW
<http://www.ala.org/ala/eventsandconferencesb/annual/2007a/home.htm>

JULY

4 **INDEPENDENCE DAY HOLIDAY**
MINITEX Office closed

11 Webinar - ProQuest Newsstand Complete
12:00 p.m. – 1:00 p.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-con...pcoming.asp#48>

18 Webinar - Introduction to Using OCLC Resource Sharing Statistics
2:00 p.m. – 3:00 p.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/oclc/#143>

19 Webinar - ELM Overview
12:00 p.m. – 1:00 p.m., CST
Online Training Session
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#63>



OCLC FirstSearch: The Basics

About FirstSearch

FirstSearch is an online service that gives library and education professionals access to a rich collection of reference databases. FirstSearch offers electronic access to dozens of databases and more than 10 million full-text and full-image articles. With FirstSearch, materials in your library collection can be identified in search results, facilitating interlibrary loan and helping to connect your users with the information they need.

Log in to FirstSearch at: <http://www.firstsearch.org/>
Log in using your assigned authorization and password.

Searching

Basic Search

Once you have selected a database to search, the **Basic search** screen (see below) allows you to select an index (Keyword, Author, Title) for your search. For a Basic Search, simply type your search terms in the appropriate box. You can also limit your search results to full-text documents, if your authorization includes full-text. Use the Basic Search if you are new to online searching or if you need quick results using a simple search statement.

Advanced Search



The Advanced Search screen lets you construct more complex searches. Up to three search terms and three indexes can be selected from drop-down menus and combined using Boolean operators (**AND**, **OR** and **NOT**). Also, more search limits are available at this level.

Expert Search

The Expert Search screen is designed for experienced searchers who prefer to enter logical search strings. Reference information on constructing a search is displayed at the bottom of the screen. A list of indexes and index labels is provided in a single drop-down menu. The index selected in this menu becomes the default index for any search terms that do not have specific index labels.

FirstSearch: The Basics

Other search features

- Browse the indexes to verify the correct spelling or format for search terms. Click the Index  button to access the Browse Index feature.
- Browse subject headings to find additional terms that may apply to your search. Click the Subjects  button to access the Subject Headings list.
Note: This feature is available only in certain databases.
- Use ranking (before you search) to organize the results of your search. Available ranking options vary by database and may include ranking by relevance or date. Ranking by number of libraries holding the item is also available in WorldCat.

Search Statements

Search statements are made up of search terms combined with the index(es) being searched. Search statements can also contain special characters, labels, or Boolean operators. In the Basic or Advanced search, the indexes are either pre-selected for you, or can be selected from drop-down menus.

Building search statements

To search for	Use	Sample search term(s)	Results
subject information	any word or words and the Keyword or Subject index	frost sangfroid	many results (common word) few results (rare word)
categories of information	index labels	su:sleep ti:moon	subject "sleep" "moon" in titles
defined phrase	quotes " "	"tunnel vision"	tunnel vision
singular or plural forms	plus sign +	plant+	plant, plants, plants', plant's, plantes, plantes'
variants or part of a word	wildcard *, # or ?	zebu*	zebu, Zebulon, zebutte
all words	AND	cold AND zinc	cold and zinc
one or all words	OR	cold OR zinc	cold, zinc, and cold and zinc
one word but not another	NOT	cold NOT weather	"cold" but not "cold weather"
words near each other, in given order	w	common w2 cold	common followed within 2 words by cold
words near each other, in any order	n	cold n3 common	cold and common within 3 words of each other

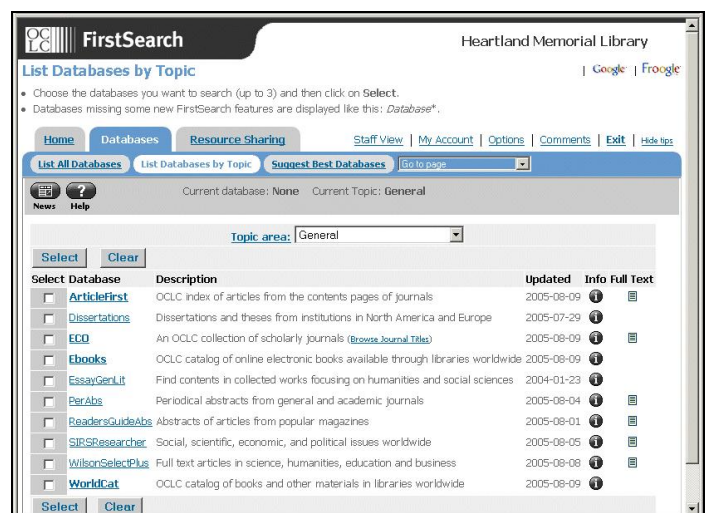
Using index labels with the Expert Search

Use an index label and:	When your search includes	Examples
colon (:)	individual words or fragments of phrases	kw:airline security
	search operators (w or n)	kw:alcohol w2 fetal
	other special search characters such as the plus sign (+) or asterisk (*)	ti:(ocean+ or sea+) and pollut*
equal sign (=)	exact phrases as in names and titles	ti=alice in wonderland

Selecting a database

You can select a database to search on the Basic, Advanced or Expert Search screens by using the **Search in database:** drop-down list on the Search screen.

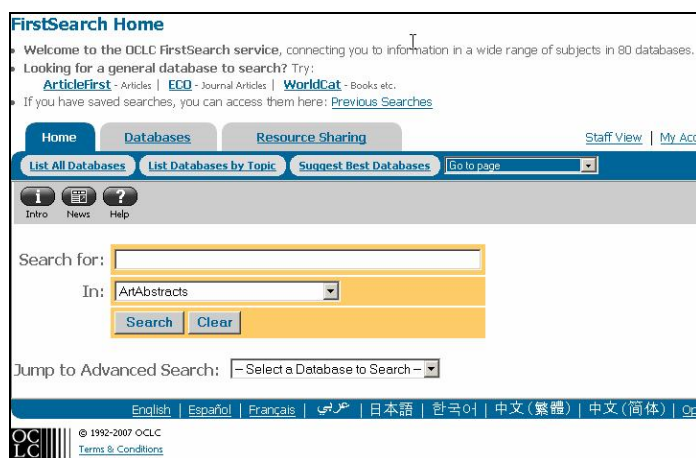
FirstSearch also provides three options for selecting a database via the **Databases** tab. Click the Databases tab and then click a link for one of the following options. The **List All Databases** option displays a merged list of all databases, while the **List Databases by Topic** option groups databases by topic area. If you need help selecting a database, use the **Suggest Best Databases** option to scan databases for your key search term(s). You can then select the databases that contain the highest estimated results for your key terms.



The Home screen

The Home screen may be the first screen you see in FirstSearch, if your administrator has configured your FirstSearch account that way. You may also reach the Home screen by clicking the **Home** tab on any FirstSearch screen.


The FirstSearch Home screen provides a simplified, Google-like Search box that enables you to enter search terms and also select a database in which to search. Searches entered from the Home screen use the Keyword search.



Search results



Viewing a detailed record


After you perform a search, FirstSearch displays the **List of Records** screen. To view a detailed record from this screen, click the item's title.

Viewing full text.  The **Full Text** button and full text format information appear with any record for which full text is available online. Click the button or the format information to see the full text.

Sorting records.  Click the **Sort** button to select sort options for a result set of 500 or fewer records. Sort options vary by database.



Related records. To find related records, click the **Related**

Authors  button or the **Related Subjects**  button.

Limiting results.  To narrow your set of results, click the **Limit** button and select from the list of database-specific limits.

Marking a subset of records

You can mark a subset of records in the Search Results list, and then print them, e-mail them or export them. Click the checkbox for each record you want in your subset. Then click the **Marked Records** link to view, e-mail or save.

Library ownership information—The **My Library Owns**  icon and the **My Library Group Owns**  icon are displayed with any resource that your library or library group owns. Click the icon to view a list of libraries that hold a particular resource.

Administrative Module

The purpose of the administrative module is to help you:

- Customize FirstSearch to meet the needs of your users and staff
- Integrate FirstSearch with your library services (such as interlibrary loan)
- Control database searching costs for your library

Basic settings you should be aware of:

Logging on to the administrative module

Access the WorldCat Services administrative module at: <http://www.firstsearch.org/admin/>

Log in using your assigned authorization and password. For your initial login, you can use the same authorization and password you use for the FirstSearch user interface.

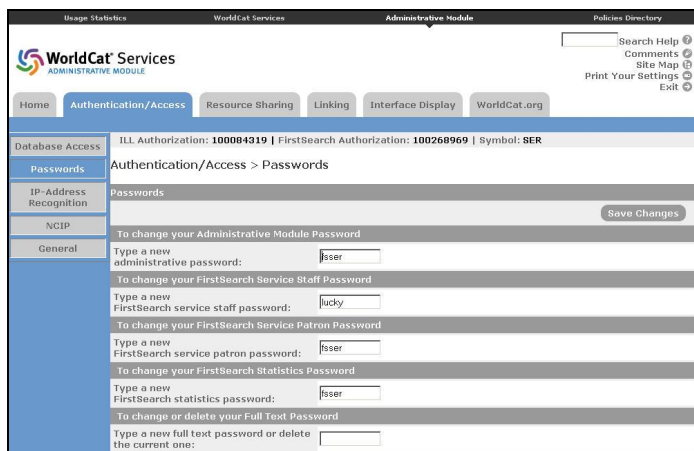
Passwords

OCLC suggests the following guidelines for new passwords:

- Use at least 4, but not more than 10 characters in the password. (You cannot type more than 10 characters when setting a new password in the administrative module.)
- Use only letters (a-z) and/or numbers (0-9) in the password.
- Do not use spaces, punctuation, or symbols in the password.
- For added security, specify different characters for each password. For example, do not specify the same password for the administrative module that you specify for the FirstSearch service.

To change your password in the administrative module, click the **Authentication/Access** tab, then click **Passwords** in the sidebar menu.

FirstSearch: The Basics



Timeouts

If a user does not send a request to FirstSearch for several minutes, FirstSearch automatically ends the session. You may specify in the admin module the number of minutes that FirstSearch waits for a request before ending a session.

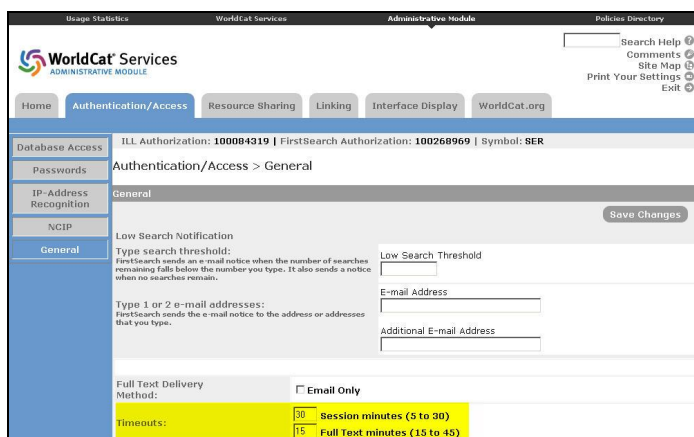
To set timeouts, click **General** in the sidebar menu of the **Authentication/Access** section.

Session Timeout

Specify the number of minutes (between 5 and 30) that FirstSearch waits for a request before ending the session if the user is viewing any FirstSearch screen (for Full Text Timeouts, see below).

Full Text Timeout

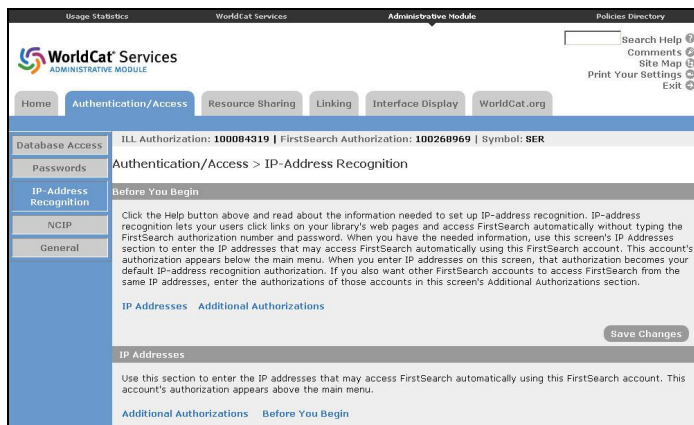
Specify the number of minutes (between 15 and 45) that FirstSearch waits for a request before ending the session if the user is viewing, downloading, or printing the full text of a journal article or other document.



Using IP-Address Recognition

For IP-Address Recognition, you specify which IP addresses may use your FirstSearch authorization to access the system. If you wish, you can add links that lead to FirstSearch from your library's web pages. The links contain special IP-Address Recognition URLs and work only for users with the specified IP address.

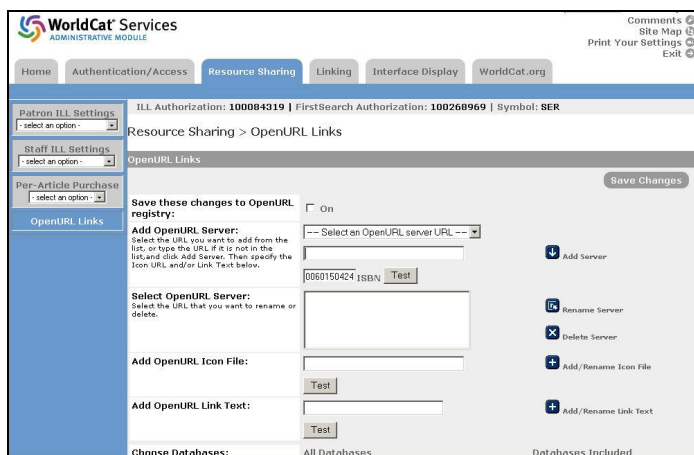
Click **IP-Address Recognition** in the sidebar menu of the **Authentication/Access** section to define IP addresses that can access FirstSearch.



OpenURL Links

The OpenURL Links feature lets you add links in FirstSearch that lead to your library's servers. If you add the links, they appear in detailed records when you search FirstSearch databases. This enables users to more easily find information in your library. You may also use OpenURL Links to create links to Ask a Librarian.

To define OpenURL Links, click **OpenURL Links** in the sidebar menu, **Resource Sharing** section of the administrative module.



Your Library

Click **Your Library Settings** in the sidebar menu of the **Interface Display** section of the administrative module to customize the interface for your users. See below for Your Library Settings options.

Your library's logo

You can add your library's logo or image to the FirstSearch service by entering the URL of the logo's image file. If you do, your logo appears throughout each FirstSearch session at either the upper left or upper right of each FirstSearch screen, depending on where you designate it to appear.

Your library's custom web links

You can provide links that lead from FirstSearch to web pages that you choose. For example, the links might lead to your library's home page, to your Ask a Librarian page, or to a preferred search engine page.

Note: Any links that you specify appear throughout each FirstSearch session near the top of all FirstSearch screens. If you also add your library's logo to FirstSearch, the links appear directly below the logo.

Features you may want to use when you are more familiar with the administrative module:

Resource Sharing Settings

You can let users submit interlibrary loan (ILL) requests to your library while they are using FirstSearch databases. To do this, set your Resource Sharing settings in the **Resource Sharing** section of the main menu of the administrative module.

Database	OCLC ILL Review File	OCLC ILL Direct Request Profile	ILL via E-mail	ILL Access
ArticleFirst	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WorldCat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ILL Processing

Use the ILL Processing feature (under Patron ILL Settings) to:

- Turn on ILL access and let users submit ILL requests while using FirstSearch. (This feature will also let you designate when the ILL button will appear to users.)
- Customize the text in the Patron ILL Request Form link.
- Control ILL processing by selecting the FirstSearch databases from which users can submit ILL requests and the method used to process the requests for each database.

WorldCat ILL Access

Use the WorldCat ILL Access feature (under Patron ILL Settings) to control the document types that your institution's FirstSearch users can request through ILL.

Patron ILL Request Form

Use the Patron ILL Request Form feature (under Patron ILL Settings) to customize the FirstSearch ILL request form for your users.

ILL via E-mail

Even if your library does not use the OCLC ILL service, you can let your users submit ILL requests by selecting the ILL via E-mail option for one or more databases. Use the ILL via E-mail option (under Patron ILL Settings) to control the e-mail message that your library receives when a user submits an ILL request. Use the option to specify the one or two e-mail addresses that will receive the messages. Also, use this option to specify borrowing library information so the e-mail message includes that information as well.

ILL Request Management

Use the ILL Request Management feature (under Patron ILL Settings) to set ILL display options for your users. You can determine whether Cancel and Renew options are available for ILL users and decide whether to display the due date for ILL loans.

FirstSearch: The Basics

Authorizations

Use the Authorizations option (under Staff ILL Settings) to designate the FirstSearch authorization for one or more staff members at your institution who will handle ILL processing.

Note: An OCLC ILL authorization can link to only one FirstSearch authorization.

Constant Data

Constant data is stored information that you can use to save keystrokes, reduce errors, and ensure consistency when you initiate or respond to ILL requests. Using constant data accomplishes the following:

- Automatically transfers repetitive data to ILL workforms and requests
- Adds to or modifies repetitive data when processing groups of requests or responses

Constant data can be created to fit routine borrowing or lending situations. The Constant Data Options are found under Staff ILL Settings, as are the following three features.

Saved Notes

Conditional (Saved) Notes are used to set any conditions for borrowing or lending. Special library hours, library lending practices or general information may be noted.

Custom Holdings

Custom holdings allow you to organize and customize library holdings displays to improve access to the OCLC symbols of your preferred lenders.

Direct Request Profiles

Direct Request automates your ILL request process; it automatically sends patron-generated ILL requests created in your system to WorldCat Resource Sharing.

Per-Article Purchase Settings

The Purchase Settings feature lets you control the cost of purchasing articles found in FirstSearch search results. The Journal Settings feature lets you turn access to full text *on* and *off* by journal.

Using NCIP Authentication

Library patrons sometimes request access to library services from remote locations. Libraries need to be able to authenticate and authorize access for these remotely located patrons. Patron authentication for the FirstSearch service through the use of the NISO Circulation Interchange Protocol (NCIP) allows library patrons to gain appropriate access to FirstSearch from any location.

The FirstSearch service currently allows access via manual logon, IP address recognition, scripted access, IP referer, and Athens authentication, none of which provides a complete access solution for all remote users. The NCIP-based patron authentication feature does not

replace these existing authentication methods, but complements and supplements them.

To define NCIP authentication for your library or institution, click **NCIP** in the sidebar menu of the **Authentication/Access** section of the administrative module main menu.

The screenshot shows the 'Authentication/Access > NCIP' configuration page in the WorldCat Services Administrative Module. The page includes a sidebar with navigation options like Home, Authentication/Access, Resource Sharing, Linking, Interface Display, and WorldCat.org. The main content area displays the following information:

- Database Access: ILL Authorization: 100084319 | FirstSearch Authorization: 100268969 | Symbol: SER
- Authentication/Access > NCIP
- Circulation System Patron Authentication
- General section with a 'Save Changes' button.
- Local System Host and Port:
- Authenticate both IP-address and NCIP: On
- Access: IP-Address Recognition
- Note: (Click Save Changes before testing Local System Host and Port.)

Linking to Online Booksellers

Participating booksellers work with libraries to link their services and users with libraries' services and users through WorldCat and the World Wide Web. When a user clicks the link to a bookseller in a FirstSearch record, FirstSearch submits a request to the bookseller's service for the item described in the record. The bookseller's website displays its results screen with a FirstSearch heading and **Return** button so the user can easily return to FirstSearch after visiting the bookseller's service.

This feature is found under the Linking tab and by clicking **Online Booksellers** in the sidebar menu. For information about a bookseller's services and programs, click its name in the **Bookseller** column of the Online Booksellers screen to go to a web site about the bookseller.

The screenshot shows the 'Linking > Online Booksellers' configuration page in the WorldCat Services Administrative Module. The page includes a sidebar with navigation options like Home, Authentication/Access, Resource Sharing, Linking, Interface Display, and WorldCat.org. The main content area displays the following information:

- Database Access: ILL Authorization: 100084319 | FirstSearch Authorization: 100268969 | Symbol: SER
- Linking > Online Booksellers
- Online Bookseller Links from WorldCat
- 739.50 Library Resources
- Outbound Linking
- OpenURL Links
- The booksellers listed below and others to be added later, are available to link to from WorldCat. Use the boxes below to enable links to the booksellers that your library wants to use. For more information about a bookseller's services and programs, click its name in the Bookseller column.
- Bookseller Link Text:
- Table with columns: Bookseller, Link from WorldCat to booksellers, Enable link
- Buttons: Select all, Clear all
- Bookseller list:

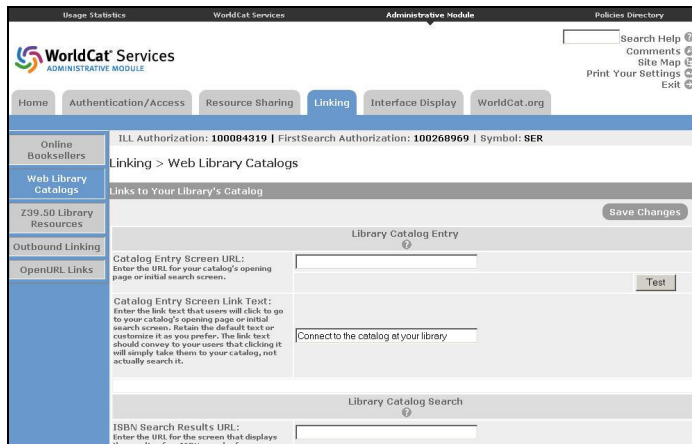
Bookseller	Link from WorldCat to booksellers	Enable link
Abebooks.com	<input type="checkbox"/>	<input type="checkbox"/>
Allibris	<input type="checkbox"/>	<input type="checkbox"/>
Antiquarian Booksellers Association of America	<input type="checkbox"/>	<input type="checkbox"/>
Barnes & Noble.com	<input type="checkbox"/>	<input type="checkbox"/>

Using Web Library Catalogs

You can add links to your library's catalog from the FirstSearch service by entering URLs for your catalog, using the Web Library Catalogs option (under the Linking tab). If you do, these links appear in FirstSearch records in select databases so users can click the links to use your catalog and determine an item's availability and location.

When a user clicks a link and goes to your catalog, FirstSearch adds a heading and a **Return** button above the screen so the user can return to FirstSearch easily. To use this feature, you must supply at least one of the four URLs requested.

Click **Web Library Catalogs** in the sidebar menu of the **Linking** section of the main menu to go to the Web Library Catalogs screen.

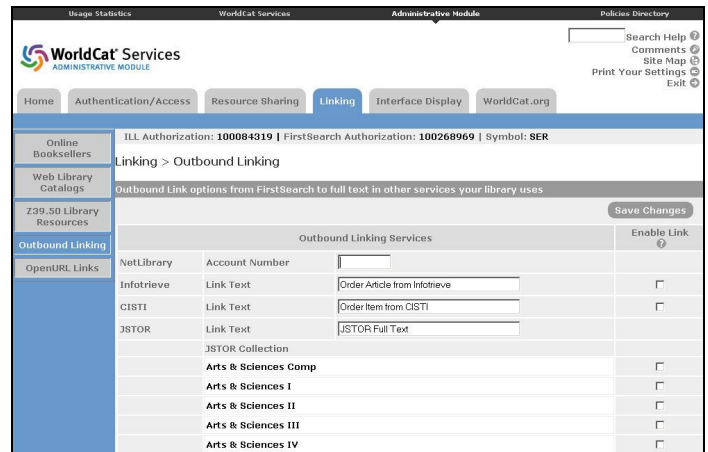


Outbound Linking

FirstSearch outbound linking lets you increase the amount of full text available to your users. It lets you provide links from FirstSearch detailed records to the full text of those items in other services that your library uses, such as NetLibrary, Infotrieve, CISTI, and JSTOR.

When OCLC establishes a new outbound linking to a particular service, it adds an additional option to the **Outbound Linking** screen in the administrative module to let you turn on the links to that service. If you make use of outbound linking, your users will see links to the various services when they view detailed records in FirstSearch. When a user clicks one of the links, FirstSearch provides access to the other service. It adds a heading and a **Return** button above the other service's screens so the user can return to FirstSearch easily.

Click **Outbound Linking** in the sidebar menu of the **Linking** section of the main menu to go to the Outbound Linking screen.



Search Settings

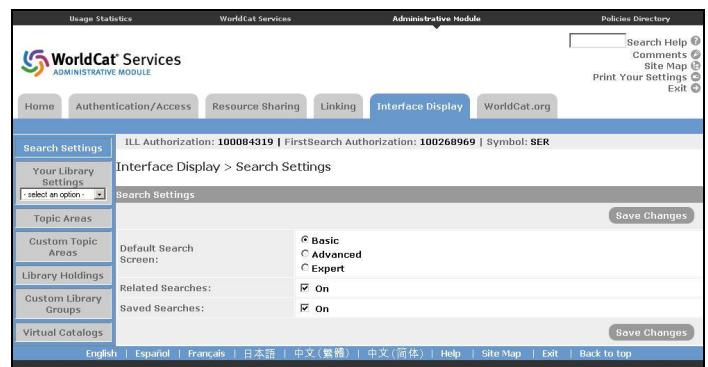
Click **Search Settings** in the sidebar menu of the admin module's **Interface Display** section. Use **Default Search Screen** to select the search screen that FirstSearch displays when a user begins a new search without choosing a specific search screen. Users can choose another search screen if they do not want to use the default that you select.

Select the default search screen that best meets the needs of your users:

- **Basic**
- **Advanced**
- **Expert**

Check the **Related Searches** box if you want to provide the **Find related** feature to your users. This feature helps users find additional records that match their latest search and provides links to selected databases. If a user clicks the link to a database, FirstSearch performs the latest search in that database and displays the search results.

Check the **Saved Searches** box if you want to provide the **Save Search** feature to your users, allowing users to save their searches.



FirstSearch: The Basics

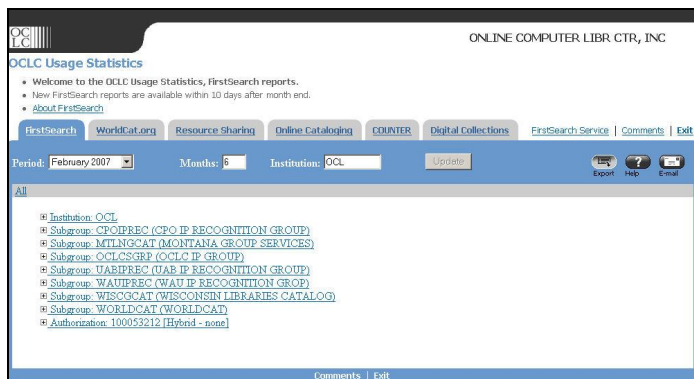
OCLC Usage Statistics

Logging on

Access OCLC Usage Statistics at

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

Log in using your assigned authorization and password.



Report availability

New FirstSearch usage statistics reports may be available as early as the third calendar day of each month. A maximum of 36 months of historical data will be available for FirstSearch reports.

For new authorizations, data will appear one month after the service begins.

Accessing reports

Logging on with any of your institution's OCLC authorizations will give you access to all available reports for your institution. If you do not have access to a particular OCLC product, you will not be able to select the reports tab for that product.

Navigating reports

- Select the appropriate reporting period to see a list of reports available for that time.
- Click on the report group name (example: Institution Reports: OCL) or the plus sign before the name to expand the list of reports available under that grouping.
- Select a report to view from the reports listed.

Printing reports

Select the landscape print format from your browser's **Print** option for best results.

Exporting reports

An **Export** button appears on the top right of each report screen. Clicking the button pops up a File Download box with the options of **Open**, **Save**, **Cancel**, and **More Info**.

Clicking **Open** will open the file in Microsoft® Excel. From there you can organize the data to fit your needs.

Logging off

When you finish viewing reports, click the **Exit** button located at the top right or center bottom of all the screens.

Support

Changing your password

Although passwords have no expiration limit, it is recommended that they be changed periodically to increase security. Log in to WorldCat Services Administrative Module to change your password.

Using Help

Click the **Help** button on any screen to view Help or to browse the context-sensitive online Help in a pop-up window.

OCLC support staff:

E-mail: support@oclc.org

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682 (7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

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