

## ANNOUNCEMENTS

### Spring Training Opportunities

The MINITEX Spring training calendar has expanded greatly. Check out our classes listed in the calendar at the front of this *Mailing*. We are offering multiple hands-on sessions of "Cataloging With the OCLC Connexion Client" and "ILL Basics Using WorldCat Resource Sharing."

To register for a session of Cataloging With the OCLC Connexion Client, go to:

<http://www.minitex.umn.edu/train-conf/oclc/#58>

A full description of the class appears below the blue session grid.

To register for a session of ILL Basics Using WorldCat Resource Sharing, go to:

<http://www.minitex.umn.edu/train-conf/oclc/#59>

A full description of the class appears below the blue session grid.

It might be a good idea to review the MINITEX/OCLC training session policies posted at:

<http://www.minitex.umn.edu/train-conf/oclc/policies.asp>

Virginia Dudley, MINITEX BATS

### Migration Countdown

As of February 1, 2005, there are only:

- 3 months until the demise of Passport for Cataloging and Passport for ILL on May 1, 2005.
- 5 months until the demise of CatME on July 1, 2005.
- 6-7 months until the demise of Passport for Union Listing in August or September, 2005.

## GENERAL

### Change in Union List Migration Date

OCLC has announced a delay in the date for the planned migration of Union List subsystem functionality until August/September 2005. This delay, from the originally announced date of June 2005, will allow additional time for design of the screen displays for union list maintenance. As we noted last month, library staff who maintain holdings for MULS and other OCLC-based union lists of serials will need to continue to use PASSPORT until the migration is complete. At that point, union list maintenance activity will shift to the Connexion browser. The implementation of MARC 21 Format for Holdings Data will occur at the same time as the migration to Connexion.

MULS staff is planning for training and workflow changes that will come with the migration. OCLC will be providing an online tutorial for library staff as well as training materials that MULS staff will adapt for our face-to-face online training sessions. We plan to pilot test our new training in the summer and begin to offer it shortly before the migration is complete. OCLC selected the browser as the first new union list maintenance tool because it is an easy-to-use format that is accessible to the full range of MULS users.

For more information about the Connexion migration and union listing see the OCLC Union List website (there's a special information box on the right side of the screen):

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

or the Connexion migration website:

<http://www.oclc.org/connexion/migrating/default.htm>

We will provide more of our MULS Webinars this spring, which provide help on searching for serials and the current union list holdings format, so MULS library staff can work to bring their holdings up-to-date to prepare for the migration.

Cecelia Boone, MINITEX MULS

### Open WorldCat News

Get the most out of the Open WorldCat Program! Help guide Internet searchers all the way to a specific record in your online catalog. It is called Deep Linking, and OCLC has provided a tutorial that tells you how to set it up.

Deep linking enables end users of Open WorldCat functionality to link from their search results (in Yahoo!, Google or other partner sites) to the Find in a Library interface and, then, directly to the item's record in your library's online catalog.

Some libraries are already set up to support this; others just need to fill out a simple form that should just take a few minutes.

You can get to the Deep Linking tutorial from the Open WorldCat Website at:  
<http://www.oclc.org/worldcat/open/default.htm>

## CATALOGING & METADATA

### Support Ends for the Superseded Connexion Client Version 1.10

Connexion client version 1.20 was released last November, and support for version 1.10 will end on March 1, 2005. All client 1.10 users must upgrade to 1.20 to be able to log on March 1. This impacts the Connexion client interface only; it does not impact the Connexion browser interface.

For more information about Connexion client 1.20, and for download information, please see the Connexion Web site at <http://www.oclc.org/connexion>.

David Whitehair, OCLC; edited

### Two New "Enhance" Libraries in the MINITEX Region

Welcome to two MINITEX libraries that were recently accepted into the OCLC Enhance Program: University of North Dakota (Shelby Harken) and North Dakota State Library (Naomi Frantes). The Enhance Program allows specially authorized libraries to correct or add information to bibliographic records in WorldCat. These are the libraries that help keep the records in OCLC WorldCat complete and accurate. In order to be accepted into the Enhance Program, an institution must submit an application, plus examples of cataloging records, for each format they wish to be qualified to upgrade. The program now includes more than 180 institutions nationwide. Six of these institutions are MINITEX libraries:

- |       |                              |                  |
|-------|------------------------------|------------------|
| • MHS | Minnesota Historical Society | Books Format     |
| • MNO | St. Olaf College             | Sound Recordings |
| • MNS | College of St. Scholastica   | Books            |
| • MPI | Minneapolis Public Library   | Sound Recordings |
| • NDS | North Dakota State Library   | Books            |
| • UND | University of North Dakota   | Books and Scores |

Thank you to all our Enhance libraries! You are helping all of us by improving the quality of WorldCat.

Requirements for participation in the Enhance Program, plus an application, guidelines and training are available at:

<http://www.oclc.org/support/documentation/worldcat/default.htm#5>

Virginia Dudley, MINITEX BATS

## **You, too, can contribute to database quality!**

All full cataloging member libraries are able to assist in ensuring quality WorldCat records. You don't have to be an Enhance participant (see article above) in order to upgrade minimal level records, plus contribute in other ways to database enrichment. All full cataloging members can add and modify all editable fields of less-than-full level master records (Encoding Levels: K, M, 2, 5, and 7) to upgrade them to full-level (Encoding Level I) or less-than-full (Encoding Level K.) The guidelines for minimal-level upgrades can be found in the *OCLC Cataloging Service User Guide*, chapter 4, section 4:

<http://www.oclc.org/support/documentation/worldcat/cataloging/userguide/4/4.htm#4.4>

You are also able to enrich master records by adding call numbers and subject headings in schemes not already present in a record; adding field 300 (Physical Description) to CIP records; adding or editing field 505 (Contents notes); adding field 856 (Electronic Location and Access) if not already present; and more. To see the complete list of enrichment possibilities, go to:

<http://www.oclc.org/support/documentation/worldcat/cataloging/userguide/4/4.htm#4.5>

**Please note:** You cannot use Database Enrichment capabilities on CONSER authenticated serial records.

Virginia Dudley, MINITEX BATS

## **Emery-Pratt becomes a PromptCat Vendor**

OCLC is pleased to welcome Emery-Pratt Company as a new PromptCat vendor. Emery-Pratt Company is a nationally recognized book distributor located in Owosso, MI. Having been in business since 1873, they have the experience and expertise to meet the growing needs of academic libraries, public libraries and hospitals throughout the United States. Emery-Pratt warehouses newly published titles from over 2,000 publishers and has contacts with over 70,000 publishing sources representing more than 2.8 million titles. Free searching of their entire in-print database, including stocked titles, is provided along with online ordering and order tracking at <http://www.emery-pratt.com>. To find out more, visit their website or call 1 800 248-3887.

Libraries may now sign up for PromptCat with Emery-Pratt as a vendor.

To see a list of all PromptCat vendors, go to:

<http://www.oclc.org/promptcat/about/vendors/>

For more information on the PromptCat service, see:

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

Cynthia M. Whitacre, OCLC

## RESOURCE SHARING

### **OCLC ILL Reports Now Available in the New OCLC Usage Statistics Interface**

OCLC is now offering Resource Sharing (ILL) reports in the new OCLC Usage Statistics interface available at <http://www.stats.oclc.org>.

This statistics application is available to all Resource Sharing users and is accessed by logging in with your OCLC authorization and password. Three of the existing Resource Sharing (ILL) reports have been implemented in this interface:

- ILL Fee Management (Borrower and Lender) Reports
- ILL Reasons for NO (Borrower and Lender) Reports
- Strategic Union List Journals Report

These reports are automatically available to all Resource Sharing libraries free of charge. Further information about the reports is available via the online Help in the interface.

Along with the Resource Sharing reports, OCLC Usage Statistics also includes the FirstSearch Usage reports and the new Open WorldCat Clicks to Libraries report.

OCLC will be making further enhancements to this interface over the coming year.

Please contact the MINITEX BATS unit or Karen Docherty in the MINITEX office with any questions regarding the OCLC Usage Statistics (see contact information at the end of this *Mailing*).

#### Other ILL Reports

Libraries who subscribe to the ILL Management Statistics and ILL Monthly Activity Report will continue to access them via OCLC Product Services Web <http://psw.oclc.org/>. OCLC will be moving those reports to the new OCLC Usage Statistics interface in the coming months.

Dana Dietz, OCLC; edited

## Custom Holdings: Why and How

You are moments away from taking off on that well-deserved vacation when the co-worker from cataloging, who promised to keep ILL running smoothly in your absence, finally shows up for training. She already knows how to search OCLC, but is there any way you can possibly explain all of the decisions that go into your rationale for selecting the best lending locations for requests in less than an hour?

You won't have to if you are using the Custom Holdings feature on OCLC. With a simple "DHC" (Display Holdings – Custom)\* or "DHU" (Display Holdings – Union List)\* command, your co-worker can choose the best referral locations like a pro! [\*In the OCLC ILL Web interface and in WorldCat Resource Sharing, you can select a Custom Holdings Path, or select a Group symbol (such as MULS).] It won't matter if you only go to libraries that charge less than \$10, lend AV materials reciprocally, and allow a two-week loan period, plus shipping time... All of those options and decisions can be automated in Custom Holdings.

How do you start? The first step is to take a good look at what you are doing now and then collect the information to start building your "groups." If most of the information is "in your head," it might be a good time to start getting that knowledge and expertise on paper before you proceed.

Consider all the factors that matter to your library, such as the lender's ability to fill the request quickly, local borrowing arrangements, and costs involved. Group libraries with like characteristics together. The smaller and more defined the groups are, the easier it will be to prioritize them and use them in multiple paths later on. Then, it's just a matter of arranging those groups to create your Custom Holdings Path(s).

At MINITEX, we assign referral priorities based primarily on turnaround time. This can be impacted by the proximity of the lending library to our office, efficiency of the delivery method and response time of the library. When applicable, MINITEX also considers cost (as in the case of referrals to WILS libraries) to help us prioritize the list of lenders.

Your library may be able to use some of the information MINITEX has already compiled to help set up Custom Holdings at your own library. Here are some resources that may be useful:

MINITEX Referral Priority Lists:

<http://www.minitex.umn.edu/docdel/priorities/>

View an archived Webinar describing how to set up Custom Holdings:

<http://www.minitex.umn.edu/train-conf/webinars/archived.asp#16>

If you have any questions about Custom Holdings, please do not hesitate to contact Carol Nelson at:

[c-nels@umn.edu](mailto:c-nels@umn.edu); (612) 624-7879; (800) 462-5348.

Carol Nelson, MINITEX Document Delivery. Reprinted with permission from *MINITEX Resource Sharing News*, no. 12, 2004.

## **Contact Information**

MINITEX Bibliographic and Technical Services (BATS), 612-624-4002, 800-462-5348,  
[mino@othello.minitex.umn.edu](mailto:mino@othello.minitex.umn.edu) (Carla Dewey Urban, Virginia Dudley, Carlos Portillo)  
OCLC Cataloging, ILL, Digitization and Preservation products and services

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OCLC Union Listing, including MULS