

ANNOUNCEMENTS

MINITEX and the OCLC Members Council

We would like to congratulate Bruce Willms, Director of Technical Services at Metropolitan State University, in St. Paul, MN. Bruce was recently elected MINITEX Delegate to the OCLC Members Council. He joins Delegate Joe Edelen, Bibliographic Control Librarian in the I.D. Weeks Library at University of South Dakota, and Alternates Wilbur Stolt, Director of Libraries at the University of North Dakota, and Pamela Drayson, Director of Libraries and Media at North Dakota State University, in representing MINITEX/OCLC members on this important committee.

We also extend our sincere appreciation to Joan Roca of Minnesota State University, Mankato, who ends his term as Delegate this month. Joan has ably represented MINITEX as Delegate for two 3-year terms, and his insight and interest have served us all well. Thank you, Joan!

The Members Council meets three times a year and is an integral part of the OCLC governance structure. Delegates elect Trustees, participate in determining OCLC strategies and policies, and are involved with specific issues, such as pricing structure. Delegates report back to MINITEX membership at MINITEX/OCLC Users Group meetings and via reports posted to the MINITEX News electronic list and on the MINITEX Bibliographic and Technical Services Web page.

The MINITEX network is pleased to send highly experienced delegates to the OCLC Members Council – delegates who demonstrate awareness and understanding of current developments in the library profession and in the region. For more information about the OCLC Members Council, please visit their Web page at:

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

Carla Dewey Urban, MINITEX

CATALOGING & METADATA

Connexion Client 1.40 Release Date Moved to July

Connexion client 1.40 release has been moved from June to July. June will be a very busy month for many of us, including libraries completing their migration to Connexion, and support staff at OCLC regional service providers (like MINITEX) and in OCLC Customer Support helping staff with migration issues. Moving the release date from June to early July will help OCLC to complete

migration before introducing the new version of the client, so that support staff will be available to help with upgrades if needed.

Connexion Client version 1.40 will include the following enhancements:

- Spell Check
- Offline validation
- Local file sort
 - Sort the bibliographic local file by call number, and view the call number in the local file list
 - When sorting the bib local file by title, the system will ignore initial characters based on the 245 filing indicator
- Local accessions list
- Access WebDewey (if you subscribe)
- Access OCLC Usage Statistics
- A Chinese (Simplified) interface
- A few batch searching and processing enhancements
- Updates to text string functionality
- Arabic script align-right option

For more information about these enhancements, please go to:

<<http://www.oclc.org/connexion/interface/client/enhancements/future.htm>>.

Also coming in July, but perhaps not in time for the initial 1.40 release, are Hebrew, Cyrillic, and Greek script cataloging as well as access to the HKCAN (Hong Kong Chinese Authority Names) database. These additions will be implemented at the OCLC host for use with Connexion Client 1.40 and will not require an additional software download.

Have You Migrated to OCLC Connexion Yet?

- CatME will be history as of July 1, 2005. It will no longer exist.
- Passport for Cataloging is already history. It disappeared from the scene on June 4, 2005.
- Passport for Union Listing will still be around until the new Union Listing interface is ready in the Connexion Browser, sometime toward the end of the year (September to December 2005). Watch for more information about this.

OCLC Connexion Changes

During the weekend of June 4-5, 2005, OCLC made some changes to the OCLC Connexion system (both Browser and Client interfaces). Some of the changes affect almost everyone (e.g. validation), others only some of you. In any case, it is important to read through the changes so you will have a better chance of knowing what's going on if you get an error message.

Add Call Numbers/Subject Headings to Master Records

You can now add a call number or subject heading(s) on a master database record, regardless of your library's profile, as long as that call number or subject heading scheme is not already present in the record. For example, if you are profiled to add LC subject headings only, you can now add NLM subject headings as long there are no NLM subject headings present in the record.

Validation

In some cases, the system previously automatically changed the tag and/or subfield for some validation errors. The system will now report these issues as validation errors so you can resolve the errors as needed. For example, previously if you entered an invalid ISBN or ISSN, the system automatically moved the data to subfield z; now the data fails with a validation error, and you determine if the data was entered incorrectly or if it should be moved to subfield z. Another example includes entering multiple occurrences on non-repeatable tags: if you entered two 245 tags, the system automatically changed the second one to a 246 tag; now the data fails validation, and you determine how to resolve the tagging issue.

Please Note: OCLC has already been notified that this change may cause copy catalogers to encounter multiple pre-existing validation errors on records they are trying to update. This could be very annoying. As a result, OCLC will ask their Quality Control Department to scan the database to locate and fix often recurring errors, such as those found in the 082 and 007 fields. It is unknown at this point when this clean up will occur. Meanwhile, if you encounter the same kind of validation error occurring again and again on records you are copy cataloging, please report this to the MINITEX BATS unit (see contact information at the end of this *Mailing*), and we will pass that information on to OCLC.

Validation error messages have been updated to include the occurrence numbers for tags and subfields, the position of the data, and MARC designations for the fixed field and 006. Additional validation changes will be included with Connexion client 1.40 (July).

In Connexion client, if you edit an unlocked record and plan to replace it, you no longer receive a validation error message on an element that you **are** authorized to add, change or delete. For example, if you have a CONSER or National Enhance authorization, you can now add, change or delete field 042 and validate without receiving a validation error on the record.

Format of Data

In some cases, the system automatically fixes the format of data such as changing lowercase and uppercase values for fixed field elements. For example, if you enter lowercase k for the Encoding

Level, the system automatically changes this to uppercase K. This will continue to work in the Connexion browser; however, Connexion client 1.30 users must enter this type of data in the correct format or records will fail validation. Connexion client version 1.40 (July) will resolve this issue.

Replaced Date in Bibliographic Records

The Replaced Date in bibliographic records in the Connexion browser now includes the full time stamp instead of just the year, month, and date. This is the same format that is included in the 005 field in exported record, and it matches how authority records display. Connexion client users will see the full Replaced Date in client 1.40 (July).

Authorities 040

When an authority record is replaced, your MARC Organization Code is now added to the 040 subfield d.

David Whitehair, OCLC; Virginia Dudley, MINITEX

Using Macros in the OCLC Connexion Client

Do you use macros? Macros can be used in the Connexion Client to automate tasks that you perform on a regular basis. You can use the automated macro recorder within the Connexion Client, or learn to write your own macros using the OCLC Macro Language (OML). To learn more, visit OCLC's Connexion Client Macros page at:

<<http://www.oclc.org/connexion/support/macros.htm>>

Here you can share your own macros or download other Connexion Client user macros, download macros user guides, and explore tutorials on writing your own. If you are planning on attending ALA in Chicago this year, there is a meeting on "OCLC Connexion Macros: Using Connexion Command to Accomplish Cataloging Tasks." It will be held Monday, June 27 from 3:00-5:00 p.m. at the Sheraton Ballroom II. For more information about this session, please go to:

<https://www3.oclc.org/app/ala_registration/>

Look for information in our next *MINITEX/OCLC Mailing* about a new fall webinar we plan to offer on macros. Also, beginning next month, we will start a regular feature in the *Mailing* dubbed "Macro of the Month." Feel free to contact us at the MINITEX BATS unit if you have a macro that you would like to share in a future issue of the *Mailing*. (See contact information at the end of this *Mailing*.)

Sara Ring, MINITEX

RESOURCE SHARING

WorldCat Resource Sharing Enhancements

Over the weekend of June 10-13, 2005, OCLC moved all resource sharing requests and administrative data to an Oracle database. This move will allow OCLC to more easily and quickly make service improvements. And, in fact, over the same weekend OCLC made a number of enhancements that improve access to and currency of data related to resource sharing.

Overview of Enhancements and Changes

- Request locking no longer exists
 - There are now different “versions” of the request so that a borrowing library, a lending library, plus a patron can all view a request at the same time.
 - Very occasionally, both a borrower and a lender may try to update the same request at the same time. When this happens, the person whose edits are received second will be prompted to review/update again.
- Advancing requests through the lender string is more efficient
 - Non-suppliers are automatically skipped in existing lender strings
 - This enhancement means that your request will not sit for four days at a library that moved to non-supplier status after you entered their symbol into the lender string of an active ILL request. Instead, the system will skip that symbol and move on to the next potential lender.
 - When a lender is entered twice into the lender string and the lender responds with a conditional message, the borrower will have 4 days (rather than 8 days) to respond to the conditional message before the request is advanced to the next different lender in the string. This will help move requests along faster.
- Requests all share one number scheme
 - Active requests and review requests now share a single numbering scheme. Review requests that are produced keep the same number that was assigned when the request was first put into the Review status.
 - As of June 13, 2005, new requests are numbered sequentially starting with 10,000,000.
- Searching for requests in the Request Manager
 - Exact match searching – for borrowing library, lending library, and request identifier (case insensitive)

- Truncated searching – for author, call number, patron department, patron identifier, patron name, and title
 - Author/title search is now obsolete
 - Review number search is now obsolete, because items in the Review file now have a Request ID (see third round bullet above)
 - For more information about these searching changes, click on the Help button (question mark with the word Help below it) on the Request Manager summary page.
- These changes will be documented in a revised *WorldCat Resource Sharing Quick Reference* guide that is scheduled to be ready by the end of June.

IMPORTANT! Significant Searching Change that May Affect You

Many of you may be used to pulling up all your active borrowing requests and/or all items currently out on loan. Previously, you could do this in the Request Manager using a '?' (question mark) in the search box. You can still pull up all your active requests, but the method has changed. Instead of a '?', you now use your own symbol.

To retrieve all your active borrowing requests (i.e., you are asking, "who have I borrowed from?"):

- Go to the Request Manager
- Type your OCLC symbol in the search box
- Choose "Borrowing Library" from the drop-down list
- Click the Search button

To retrieve all requests representing items out on loan from your library (i.e., you are asking, "who has borrowed from me?"):

- Go to the Request Manager
- Type your OCLC symbol in the search box
- Choose "Lending Library" from the drop-down list
- Click the Search button

Virginia Dudley, MINITEX

WorldCat Resource Sharing Documentation

Are you just getting started with WorldCat Resource Sharing? Or do you need some help with the functionality? Visit the documentation page at:

<http://www.oclc.org/support/documentation/resourcesharing/default.htm>>

Here you will find links to a wealth of information, including tutorials to get you started, an explanation of borrowing and lending categories in the Request Manager, how to use the Policies Directory, how to create custom holdings, a Direct Request planning guide, and more!

The documentation also includes a very handy 4-page guide called *WorldCat Resource Sharing Quick Reference*. We are sending you a copy of this guide with this *Mailing*. Toward the end of June, the guide will be updated to include all the new enhancements (including Request Manager searching) discussed in the article above.

Custom Holdings Tutorial

Check out the new Custom Holdings tutorial available at:

<http://www.oclc.org/support/training/firstsearch/tutorial/>

This tutorial will help you analyze your institution's borrowing patterns, show you how to create Custom Holdings Groups and Paths, and how to apply Custom Holdings to workforms in OCLC WorldCat Resource Sharing.

Make sure to check the system requirements for running this tutorial (located at the bottom of the tutorial page).

REFERENCE

New Open WorldCat Search Tools Available for Download

The Open WorldCat Web site now includes information about some Open WorldCat-enabled Web tools that can help you and potential library patrons search more conveniently for library materials from a PC desktop. The three tools featured on this page are:

- Yahoo! Toolbar. This special edition on the Yahoo! Toolbar provides always-there access to Open WorldCat records via Yahoo! Search.
- Google Toolbar with Autolink feature. The newest version of Google Toolbar enables always-there access to Open WorldCat records through its Autolink feature. Autolink detects the presence of specific kinds of information on the current Web page and—by

pressing the Autolink button on the Toolbar—links to related or lookup information for that item.

- Firefox search extensions. Add WorldCat searching to the Search Bar of the popular open-source Web browser Firefox. From an ever-present browser pane, you can enter your search terms and select the search engine to be queried.

To learn more about these toolbars and to download them, go to:

<<http://www.oclc.org/worldcat/open/searchtools/default.htm>>

To participate in Open WorldCat, your library must meet two criteria: 1) Your holdings must be in WorldCat, and 2) You must subscribe to WorldCat. Most libraries in MN, ND and SD participate in statewide subscriptions to WorldCat, so meet the second criteria.

Has your library enabled deep linking from WorldCat to your library holdings? "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 (OPAC). To learn how to enable these links, checkout the tutorial at:

<http://www.oclc.org/worldcat/open/deeplinking/openworldcat_deeplinking.pdf>

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Contact Information

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OCLC Cataloging, ILL, Digitization and Preservation products and services

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OCLC Union Listing, including MULS