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### *ATTACHMENTS*

OCLC WorldCat Resource Sharing: The Basics

## ANNOUNCEMENTS

### Fall Training Schedule Now Available

We talked with many of you over the summer about what kinds of training that library staff in the MINITEX region need. If you do not see a topic offered about which you would like training, please let us know! There are additional courses planned for Spring 2006 on such topics as Authorities, advanced searching in WorldCat, and advanced cataloging using Connexion. Currently, we are offering the following:

- Introduction to the MARC21 Format for Holdings Data (Full Day, Hands On)
- WebDewey Update (Webinar)
- MARC Format for Non-Catalogers (Webinar)
- Connexion Client Macros for the Absolute Beginner (Webinar)
- Introduction to the OCLC Connexion Client (Full Day, Hands On)
- ILL Basics Using WorldCat Resource Sharing (Full Day, Hands On)
- Cataloging Using OCLC's Connexion Browser (Full Day, Hands On)

Please visit the MINITEX OCLC Training Web page to view descriptions and dates of the above courses or to register:

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

BATS staff, MINITEX

### 1000 Most Widely Held Works in WorldCat

OCLC Research has updated its "OCLC Top 1000" Web site, which lists the works most widely held by OCLC member libraries around the world. In addition to the main list, the site includes thematic sublists, sample cover art, Open WorldCat "Find in a Library" links, comparisons to other lists, and data files available for downloading in Excel format.

As with the 2004 edition, visitors can view all 1,000 ranked titles or any of a baker's dozen different sublists, including banned books, biography, books made into films, children's books, drama, fiction, librarianship, music, poetry, and others. Cover art and links to local libraries are available for most titles. Viewers can read about the project, including how the list was developed and key points of interest about items on the list. A list of runners up provides a peek at works that barely missed the cut. For more information visit the following url:

<<http://www.oclc.org/research/top1000/default.htm>>

Here are just a few "fun facts" about the updated Top 1000:

- **Who is the top monster?**  
Dr. Frankenstein's monster. Ranking 43, he beat both Count Dracula (75) and Edward

Hyde (*Dr. Jekyll and Mr. Hyde* ranked 141). This year the vampire, Lestat, ranked 927 on the OCLC Top 1000 list, but Shrek didn't make the list.

- **How many works by Stephen King made the Top 1000 list?**  
Zero, to our surprise. *Gunslinger* ranked 1080, though.
- **How many of the OCLC Top 1000 works are anonymous?**  
59 works are anonymous or do not have a single author. (In library parlance, there are 59 "title main entry" works.)
- **If all the Harry Potter books were bundled together, how would they have stacked up?**  
We didn't bundle them together, but if we had, these books would have ranked 5th on the Top 1000 list (and 1st on the Top Fiction list, 2nd on the Top Children's list). Considered together, 44,976 Harry Potter items are held by libraries, and they are represented by 496 different bibliographic records.
- **Which author on the list is most held by OCLC libraries?**  
William Shakespeare, followed by the United States government, Charles Dickens, Mark Twain, and Giuseppe Verdi.

OCLC; edited

## GENERAL

### **MULS: Migration is Coming! Migration is Coming!**

Major changes are coming in the next few months for *MULS; the MINITEX Union List of Serials* that will mean changes for staff who maintain their library's holdings for MULS in OCLC. OCLC has announced that PASSPORT Union Listing, the interface that library staff has long used to maintain their MULS holdings, will be retired on **Feb. 19**, and holdings maintenance will move to the Connexion browser. Also, OCLC plans to implement the MARC 21 Format for Holdings Data (MFHD), which will mean that libraries will be able to provide more detailed holdings information than has been the case in the past.

MINITEX/MULS staff will announce training opportunities for library staff members on the new Connexion browser interface and on OCLC's implementation of MFHD once final timetables and training materials have been developed. MINITEX/MULS staff will provide webinars and on-site training, and OCLC is preparing online tutorials and other learning opportunities to help library staff make the transition.

In relation to OCLC billing procedures:

- To accommodate the migration from PASSPORT to the Connexion browser, all MINITEX/MULS libraries that do their holdings maintenance online in OCLC will need to have an OCLC Cataloging Subscription beginning in Feb. 2006, unless they do ILL/UL only. Those libraries will be given an authorization to use Connexion, but will not need a cataloging subscription.
- For libraries that search MULS or other OCLC-based union lists through OCLC Resource Sharing but do not do online maintenance, subscription pricing to WorldCat Resource Sharing will be required. More information about pricing is expected later in November.

Twenty MULS libraries ordered printouts of their MULS holdings during the "last chance" order cycle for OCLC's Serials Offline Union List Products (SULOPS), which ended Oct. 24. The products are scheduled to be run Dec. 1 and should arrive at ordering libraries in mid-December. New products, which are expected to provide greater flexibility and more information, are to be developed and released after February's planned migration date.

Cecelia Boone and Dave Linton, MINITEX

### **More WorldCat Collection Analysis Enhancements**

In mid-October OCLC added two more enhancements to WorldCat Collection Analysis, an online service that enables librarians to analyze individual and group library collections.

- There is now a Division for Government Documents. Titles in this Division represent those items that do not have an LC, Dewey, or NLM call number but do have a Government documents classification number (from the MARC21 086 field). This new Division will reduce the number of titles in the Unknown Classification Division where Government Documents were previously counted, but it will not include all Government Documents because many of them also include an LC call number.
- OCLC has also created eight new Electronic Formats to replace the Internet Resources Format. The new formats are:
  - Archival Materials, Electronic
  - Articles, Electronic
  - Maps, Electronic
  - Musical Scores, Electronic
  - Serial Publications, Electronic
  - Sound Recordings, Electronic
  - Texts, Electronic
  - Visual Materials, Electronic

If you would like some hands-on experience with Collection Analysis and would like to see these new features, you can go to OCLC's Collection Analysis Web site and click on the link "View the Online Demonstration."

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

If you have questions about Collection Analysis, please contact Mark Wilhelmi at MINITEX (contact information at the end of this *Mailing*).

Mark Wilhelmi, MINITEX

## CATALOGING & METADATA

### Connexion Client 1.50 Release in November

Connexion client 1.50 is coming in November, and it is full of enhancements! After Connexion client 1.50 is released, check our OCLC calendar to register for a one-hour webinar that will demo the new version. Listed below are some of the enhancements that are coming out with client 1.50. For a complete list, see the future enhancements page at:

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

- **Batch set or delete holdings without having to retrieve the records first**  
Enter or import a list of OCLC control numbers and specify to Update Holdings, Produce and Update Holdings, or Delete Holdings using menu item Batch, Holdings by OCLC Number. Run the batch to set or delete holdings based on the control number without downloading the records before taking the actions. Specify whether holdings should be set on records your library already holds. View a report summarizing the batch.
- **Apply constant data automatically to records downloaded via batch searching**  
Optionally, apply your default constant data record to all records downloaded via batch searching, similar to the option to assign a My Status value to all downloaded records. Set this option under *Batch --> Process Batch --> Search Options*.
- **Customize short index list in Search and Browse WorldCat dialogs**  
In the Search WorldCat and Browse WorldCat dialogs, select the customize button to customize the short drop-down list of indexes. Add, remove, or change the order of indexes
- **Limit WorldCat searches by Material Type using drop-down list of values**  
In the Search WorldCat dialog, limit your search by Material Type such as biography, CD audio, DVD video, and fiction using a short list of 10 pre-selected material types or a complete list of over 100 types. Or customize the short list by adding, removing, or changing the order of material types.
- **WorldCat truncated lists**  
WorldCat truncated lists are displayed by default for searches that result in 6-100 matches. The truncated list now shows whether the item is held by your library. Optionally, click the right-mouse button and select List Settings to add columns to the

truncated list to display the total number of holdings on the record and the OCLC control number.

- **Fixed field elements**

View drop-down lists for valid values for each fixed field element, similar to what was previously available in CatME. Optionally, turn off this feature by unselecting "Use dropdowns for fixed fields" under Tools --> *Options* --> *Record Display*.

- **Populate fields from other records**

Automatically add linking field data by entering tag 760-787 and an OCLC control number. Select Edit --> *Insert from Cited Record* to derive the data from the OCLC record you enter. The client populates the field for you. This functionality was formerly available in the Connexion browser interface only.

- **Set validation options**

Customize the validation level used for setting holdings on existing WorldCat records and for exporting bibliographic and authority records. Choose among three levels -- none, basic, full -- under Tools --> *Options* --> *General* --> *Validation Options*. The default option is "none."

- **Define Start-up action**

Define an action to be completed each time you open the client software. Some examples include Logon, Logon + Search WorldCat, or Search Local File (bibliographic). If the selection includes logon, the client logs you on using your default authorization number and password. Specify a start-up action under Tools --> *Options* --> *Startup Options*. Or, continue to specify a macro to run automatically at startup.

- **User Tools definition**

User Tools 1-10 can be assigned to characters, macros, or text strings. They can be accessed from the Tools --> *User Tools* menu or from the 1-10 buttons on the toolbar. New with client 1.50, view a default description of the user tool that shows on the Tools --> *User Tools* menu list and in the pop-up tool tip on the toolbar. Or customize the description in Tools --> *User Tools* --> *Assign* --> *Modify Description*. For example, the OCLC Four Figure Dewey Cutter Macro default description is "Macro Dewey!FourFig". Optionally, change to "Run Dewey Macro".

- **Macro commands**

Use new macro commands *IsHeadingControlled* to determine if a field in a bibliographic record contains a controlled heading and *CopyRecord* and *MoveRecord* to copy and move records in local files.

- **German and Korean interfaces**

Select a newly available German or Korean interface language, in addition to English, Spanish, Chinese (simplified or traditional), or Japanese interfaces, which are currently supported in client 1.40. Change the interface language under Tools --> *Options* --> *International*.

David Whitehair, OCLC; edited

## **A New Online User Guide: OCLC Catalog Cards**

This guide provides essential information about OCLC catalog cards and contains guidelines and examples for card production.

The material in OCLC Catalog Cards is derived from an older OCLC user guide, the *Cataloging User Guide*. The information was formerly found in Chapter 7 of the *Cataloging User Guide*.

*OCLC Catalog Cards* is available from three locations on the OCLC Web site:

- The WorldCat Documentation area:  
<<http://www.oclc.org/support/documentation/worldcat/default.htm>>
- The Connexion Browser Documentation area:  
<<http://www.oclc.org/support/documentation/connexion/browser/default.htm>>
- The Connexion Client Documentation area:  
<<http://www.oclc.org/support/documentation/connexion/client/default.htm>>

Peter Insabella, OCLC; edited

## **New PromptCat Partner: Mackin Library Media Services**

Mackin Library Media Services, located in Burnsville, MN, has recently joined the growing list of OCLC PromptCat vendors. Mackin is known for service to K-12 libraries and offers the world's largest K-12 age appropriate database of materials available for order. Libraries may now sign up for PromptCat with Mackin as a vendor.

PromptCat is OCLC's automated copy cataloging service, offered in partnership with library material vendors. If you have a cataloging subscription, the service is included. For more information about the PromptCat service, visit the following URL:

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

OCLC; edited

## **Macro of the Month: Set Fixed Fields**

This month's macro can be useful if you want to customize your fixed fields for cataloging. This macro customizes the **Date** fixed fields. The macro sets the first date fixed field as "uuuu" and the second date fixed field to "9999," but you can alter them to fit your needs. If you need instructions on how to add macros to Connexion client, look for the handout "Exercise 2: Adding a macro to Connexion from an external source" on our BATS Web site:

<<http://www.minitex.umn.edu/bats/products/macros.asp>>

'MacroName:FixedFields

'MacroDescription:Sets the first date field to "uuuu" and the second date field to "9999"

Sub Main

Dim CS As Object

Set CS = CreateObject("Connex.Client")

bool = CS.SetFixedField("Dates", "uuuu")

bool = CS.SetFixedField(",", "9999")

End Sub

posted on OCLC-CAT 9/26/2005 by Joel Hahn

## RESOURCE SHARING

### **New Resource Sharing Quick Reference Guide Available**

Attached in this month's mailing is a new quick reference guide, "OCLC WorldCat Resource Sharing: The Basics." This eight-page document describes the essentials of using OCLC's Resource Sharing system for interlibrary loans. It is geared toward library staff members who perform interlibrary loan functions on an infrequent basis, or who may be new to ILL concepts and procedures.

A section on Setup takes you through the procedure of establishing ILL settings in the FirstSearch administrative module. Other sections cover Logging On to WorldCat Resource Sharing, Borrowing, Lending, Batch Updating, and Printing Requests.

OCLC WorldCat Resource Sharing: The Basics is also available online, in both HTML and PDF formats, from the OCLC Web site:

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

### **WorldCat Resource Sharing Enhancements**

You may have noticed some changes to the Resource Sharing interface recently. Two enhancements to WorldCat Resource Sharing were installed last month. Below is a summary of these changes; OCLC is working on help documentation and when it is available, we will mention it in the next OCLC *Mailing*.



## Request Manager Searching Changes

You can now search the request manager by label (i.e. command searching). For example, if I wanted to search my requests for a specific title, I could enter ti: Harry Potter and the Goblet of Fire. Here are the current index labels available:

- Author (au:)
- Borrowing Library (bl:) – your library is the borrower
- Call Number (cn:)
- Lending Library (ll:) – your library is the lender
- Patron Department (pd:)
- Patron ID (id:)
- Patron Name (pn:)
- Request Identifier (an:)
- Title (ti:)

**Please Note:** Searching the request manager by borrowing and lending library was inadvertently made case-sensitive, and uppercase characters must now be used until it is resolved with the next install in early November. For example, typing bl: MII in the search box of Request Manager will pull up all items you have borrowed from MINITEX. If you type in bl: mii you will not get any results.

In addition, searching requests in Request Manager can now be accomplished more efficiently using a variety of methods:

- Keyword
- Phrase
- Truncation
- Exact Match

The searching process varies for different search types. These procedures are outlined in full in the online Help files and in online documentation at:

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

## Mailing Labels

Mailing labels and/or bookstraps can be produced using a "mail merge" using the exported batch file from Request Manager. OCLC does not have help documentation available for this new feature yet, but it is planned to be included in the November update. If you have any questions about using this new feature, please contact the MINITEX BATS unit (contact information at the end of this *Mailing*).

Sara Ring, MINITEX

## FirstSearch Tips Page Updated

Nine tips have recently been added to the FirstSearch Tips page on OCLC-Web:  
<<http://www.oclc.org/support/tips/firstsearch/default.htm>>

These tips will help you to:

- **Add links to OpenURL servers.** Maximize the resources your library already has by adding links on search results screens that lead to OpenURL servers that you designate.
- **Create custom library groups.** Limit search results to holdings of libraries in a given geographical area or consortium, or to libraries with whom your patrons have borrowing privileges.
- **Display all libraries.** Give your patrons the option to view the holdings of all OCLC member libraries in FirstSearch.
- **Make the FirstSearch search interface look the way you want it to.** Display your library logo and image, add your consortium or group name, choose a color palette, and more.
- **Set timeouts.** Determine how long FirstSearch waits for a request before automatically ending a session.
- **Set up links to other services.** Add links to NetLibrary, JSTOR archives and Infotrieve document delivery.
- **Set up the Resource Sharing interface** through FirstSearch. Use OCLC Resource Sharing to handle your ILL requests, display holdings, enter lender strings, and more.
- **Enable the FirstSearch/ILL link.** Turn on a link in FirstSearch so your users can submit ILL requests during their search sessions.
- **Customize the ILL Request Form.** Choose which fields display on your ILL Request Form. Change field labels to reflect terminology used at your library, include customized notes that display to users.

OCLC

## REFERENCE

### Open WorldCat Promotional Tools Now Available

Promotional tools for the Open WorldCat program are now available on the OCLC Web site:  
<<http://www.oclc.org/worldcat/open/promote/default.htm>>

These tools can help you inform Internet users in your community that items in your collection can be located through the Web sites they use every day, including Yahoo! Search and Google. Other tools allow you to communicate to funding bodies the value that Open WorldCat adds to your investment in OCLC membership. Download and use these tools to increase awareness of Web access to your library's resources through Open WorldCat and its "Find in a Library" interface:

- **Printable table tent**  
This eye-catching piece for display in library common areas tells your patrons in simple step-by-step language how to use Google and Yahoo! to locate materials in your library, and where they can download Open WorldCat-enabled browser toolbars.
- **HTML e-mail**  
If you regularly send styled HTML mail to your patron base, you can copy the text of a suggested promotional message and download one of two GIF-image illustrations to accompany it.
- **Customizable news release**  
This news release template can be customized with information such as library name, Web site URL, phone number and library spokesperson. Distribute it to community newspapers, local Web sites, TV stations and other media.
- **Customizable flier**  
This one-page information sheet provides an executive summary of Open WorldCat. Customize and use the flier to reinforce the value of your OCLC investment to funding bodies.
- **Presentation slide**  
Library administrators can customize this PowerPoint slide and add it to presentations about their library and its value to their user community.

## 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

Karen Docherty, MINITEX Cooperative Purchasing & Electronic Resources Services  
(CPERS), 612-624-2924, 800-462-5348, kdochert@umn.edu  
OCLC Reference products and services

Cecelia Boone, 612-624-6353, 800-462-5348, c-boon@umn.edu  
Dave Linton, 612-624-3360, 800-462-5348, linto001@umn.edu  
OCLC Union Listing, including MULS

**MINITEX Calendar of Training, Meetings, and Conferences**  
**November 2005**  
(Updated October 28, 2005)

This calendar primarily lists events scheduled by MINITEX, although other events are included. This is an informational posting only, registration materials are sent separately. If you are interested in attending a workshop and have not received registration materials two weeks prior to the event, contact the MINITEX Office (612-624-4002, 800-462-5348). For OCLC training sessions, ask for Kay Kirscht. There is a registration fee for many of the events listed.

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

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

NOVEMBER

- 7 Introduction to the MARC21 Format for Holdings Data  
9:00 a.m. – 4:00 p.m.  
Cedar Shore Resort  
Chamberlain, SD  
<http://www.minitex.umn.edu/train-conf/oclc/#29>
- 9 NetLibrary Fall 2005 Shared Collections: Public Library and Spanish Language  
10:00 a.m. – 11:00 a.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#81>
- 10 NetLibrary Fall 2005 Shared Collections: Public Library and Spanish Language  
2:00 p.m. – 3:00 p.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#81>
- 10 WebDewey Update  
10:00 a.m. – 11:00 a.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#82>
- 14 MARC Format for Non-Catalogers  
2:00 p.m. – 3:00 p.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#12>
- 15 Connexion Client Macros for the Absolute Beginner  
1:00 p.m. – 2:00 p.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#74>

NOVEMBER, *continued*

- 16 Introduction to the OCLC Connexion Client  
9:00 a.m. – 4:00 p.m.  
University of Minnesota, Twin Cities  
S30-C Wilson Library  
Minneapolis, MN  
<http://www.minitex.umn.edu/train-conf/oclc/#83>
- 17 SELCO ELM Training  
SELCO  
Rochester, MN  
*For more information, contact \_\_\_\_\_?*
- 18 ILL Basics Using WorldCat Resource Sharing  
9:00 a.m. – 4:00 p.m.  
University of Minnesota, Twin Cities  
S30-C Wilson Library  
Minneapolis, MN  
<http://www.minitex.umn.edu/train-conf/oclc/#59>
- 24-25 Thanksgiving Holiday  
*MINITEX Office Closed*

DECEMBER

- 2 MINITEX Policy Advisory Council  
9:00 a.m. – 12:30 p.m.  
Elmer L. Andersen Library  
University of Minnesota  
Minneapolis, MN
- 6 WebDewey Update  
10:00 a.m. – 11:00 a.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#82>
- 7 ILL Basics Using WorldCat Resource Sharing  
9:00 a.m. – 4:00 p.m.  
University of Minnesota, Twin Cities  
S30-C Wilson Library  
Minneapolis, MN  
<http://www.minitex.umn.edu/train-conf/oclc/#59>
- 13 Introduction to the OCLC Connexion Client  
9:00 a.m. – 4:00 p.m.  
University of Minnesota, Twin Cities  
S30-C Wilson Library  
Minneapolis, MN  
<http://www.minitex.umn.edu/train-conf/oclc/#83>

DECEMBER, *continued*

15 Cataloging Using OCLC's Connexion Browser  
9:00 a.m. – 4:00 p.m.  
University of Minnesota, Twin Cities  
S30-C Wilson Library  
Minneapolis, MN  
<http://www.minitex.umn.edu/train-conf/oclc/#85>

23-26 Christmas Holiday  
*MINITEX Office Closed*

JANUARY

2 New Year's Holiday  
*MINITEX Office Closed*

10 MARC Format for Non-Catalogers  
9:00 a.m. – 10:00 a.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#12>

11 WebDewey Update  
10:00 a.m. – 11:00 a.m.  
Online Training Session  
<http://www.minitex.umn.edu/train-conf/webinars/upcoming.asp#82>

20-25 ALA Midwinter Conference  
San Antonio, Texas  
<http://www.ala.org/ala/eventsandconferencesb/midwinter/2006/home.htm>