

GENERAL

Upcoming OCLC Web Information Sessions

OCLC continues to present a growing number of web information sessions that include a live presentation and are available at no cost. You can access these sessions via the Web with audio available via a conference call.

Registration

Space for these sessions is limited, so please register early. To register, send the following information via e-mail to libservices@oclc.org: (1) session name, (2) session date & time, (3) your name and title, (4) institution name and OCLC symbol, and (5) your e-mail address and phone number.

Details for logging on to the Web information session will be sent after you register. If you have questions about the OCLC Web information sessions, please contact OCLC at 1-800-848-5878, ext. 6251, or libservices@oclc.org.

Sessions scheduled for March include:

Collection Management

Learn how collection analysis can help your library. Collection analysis is a necessary aspect of preparing a collection development policy.

OCLC Automated Collection Analysis Service (ACAS) offers accurate, systematic collection analysis and management data, so your library can:

- Analyze your collection for accreditation.
- Determine strengths and weaknesses of your collection.
- Enhance your collection development activities.
- Gain new funding for library materials.
- Determine if your library materials support your programs.
- Plan to reach future collection development goals.

Tuesday, March 11

5:00–5:30 p.m. US Central Time

Learn How to Develop Your Non-English Collections

The OCLC Language Sets service makes it easy and affordable to meet the needs of an increasingly culturally diverse population of library users. OCLC Language Sets are available in Spanish, Chinese, Japanese, Korean, Vietnamese and Russian as well as the following South Asian languages: Hindi, Bengali, Gujarati, Punjabi, Urdu and Tamil.

What we do for you:

- Select current bestsellers in Asian, Russian, and Spanish languages (plus Spanish videos for adults and children).
- Acquire the items.
- Catalog in full MARC with LC subject headings, Blinded subject headings (Spanish titles), and Dewey or LC call numbers.
- Physical processing for your items, if you wish.
- Set your holdings in OCLC WorldCat.
- Ship your new materials to you at no cost.

Tuesday, March 25

3:30–4:00 p.m. US Central Time

Custom Cataloging Services

Enhance Your Collection's Accessibility. With the OCLC MARC Record Service (OCLC MARS[®]), you can increase the consistency of your catalog's headings and update your authority records to ensure that your users retrieve all the items they need from your collection with just one search. Authority control compares, validates and corrects headings in bibliographic records by matching them against current authorized sources.

When do you need OCLC MARS? If you are:

- Not currently controlling your catalog's headings.
- Implementing a new local system.
- Beginning to catalog electronically.
- Joining a consortium.
- Using OCLC's contract cataloging, conversion or local database creation services.

Using the OCLC MARS service will ensure your catalog is up-to-date for these critical projects.

Tuesday, March 25

2:00–2:30 p.m. US Central Time

Learn How to Give Your Patrons Improved Access to Your Entire Collection.

OCLC Custom Cataloging Service – OCLC TechPro and OCLC RetroCon – offer a complete range of cataloging and conversion services for all types of collections. We provide contract cataloging and physical processing for materials in all bibliographic formats and about 40 languages, for both long- and short-term solutions.

OCLC Custom Cataloging services let you add an experienced team of catalogers to your staff at a price you can afford. You can improve your users' search results by providing a complete and upgraded online catalog, with all of your records in full MARC format.

Tuesday, March 25

4:30–5:00 p.m. US Central Time

OCLC Connexion Diacritic Entry Method Changed

Effective Feb. 16, 2003, OCLC Connexion browser users began entering diacritics following the character they modify. This change conforms to Unicode standards and will bring OCLC's handling of diacritics more in line with worldwide practice.

PLEASE NOTE: This change affects entering diacritics in Connexion only. It does NOT impact entering diacritics with OCLC CatME or OCLC Passport. It does NOT impact the exported record. Records that you get from OCLC and load into your system are exactly the same (even from Connexion). This change does NOT impact your local system.

Important points to remember

- When using Connexion, enter the diacritic **following** the modified character.
- A pop-up box for easy diacritics entry is available for Internet Explorer users.
- No changes are required for record export. Records will be exported in the same format as they are currently.

[Susan Walker, OCLC, *Bits and Pieces*, Feb. 2003]

OCLC Interim Policy for Cataloging Remote Access Electronic Serials

CONSER has adopted a new policy to create single records to represent remote access electronic serials that are available from various aggregators or providers. Previously, multiple records were created whenever a remote access electronic serial was available through different aggregators or providers. The change in practice does not change the option of utilizing the corresponding print version record to note the availability of its online counterpart.

Guidelines

The guidelines concerning the content of the "CONSER aggregator-neutral record" will be worked out in the second quarter 2003. OCLC practice will change to coincide with CONSER practice. However, to reduce the number of multiple records that will need to be collapsed after the guidelines are finalized, CONSER recently announced an interim policy for cataloging online versions of electronic serials. OCLC member libraries should follow the policy outlined below when working with either CONSER or non-CONSER remote access electronic serial records in WorldCat.

- **If** no record for an electronic serial exists and you are not opting to use the print version record, **then** create a record for the electronic serial based on the publisher's Web site (if readily available) or, otherwise, based on the version to which you have access.
- **If** a record already exists in WorldCat representing the electronic serial, **then** use that record even though it may only cite an aggregator or provider other than the one to which you have access.
- **If** multiple records already exist in WorldCat representing the electronic serial, **then** choose one of the records. Prefer a CONSER record when available

After selecting a record, you may add the URL to the master record as permitted under your OCLC cataloging authorization or report the addition of the URL via one of the error reporting methods outlined in section 5 of *Bibliographic Formats and Standards*

<http://www.oclc.org/bibformats/en/quality/>

For existing records, do not add notes, added entries, etc., for the aggregator or provider.

[Robert Bremer, OCLC, *Bits and Pieces*, Feb. 2003]

Tips for Migrating from OCLC Passport for Cataloging

Are you still using Passport for cataloging? Remember, Passport for Cataloging is going away as of Dec. 31, 2003. Should you migrate to OCLC CatME? Migrate to the Connexion browser? Wait for the Connexion client? Here is some information to help you pick your migration path. Also feel free to contact the MINITEX Bibliographic and Technical Services (BATS) unit to discuss your questions.

Macros

Do you use many Passport macros? If yes, you can migrate to CatME or wait for the client (June 2003); macros are not supported with the browser. If you wait for the client you will only migrate your macros once. You will need to recreate your Passport macros in the client, as the structure of Passport macros is different from those used with the client. You will be able to create your macros manually or use a macro recorder in the client.

If you migrate to CatME, you must manually recreate your macros in CatME. CatME does not include a macro recorder. You cannot use macros from Passport with CatME. Later, you must migrate to Connexion, which means moving your macros twice. OCLC expects to provide a macro converter to help you convert CatME macros for use with the client. You may be required to do some editing before the macros will work with the client.

Terminal Session (Telnet) Connections

Do you connect to your local system via a telnet session to run macros between Passport and your local system? If yes, you can migrate to CatME to use the terminal session functions in CatME to continue to run macros between OCLC and your local system. This function is not supported with

the browser. OCLC expects to add this to the client in 2004 – after the end of life of Passport for cataloging. Passport users requiring this functionality must migrate to CatME.

Export via TCP/IP

Do you export directly to your local system via TCP/IP? CatME, Connexion browser, and Connexion client (June 2003) all support this function. However, please note the following:

When exporting from the Connexion browser, the record is actually delivered directly from OCLC to your system. You may need to open your local system to receive records from the Connexion IP address to get the records inside your firewall. CatME and Connexion client records are delivered through your workstation, so they do not have this issue.

Some local systems return information after an export that is displayed in Passport when export is set up via OCLC Gateway export. This information cannot be displayed in the Connexion browser; however, it can be displayed in CatME and the Connexion client.

Export via a Communications or Printer Port

Do you export to your local system via a communications or printer port? The Connexion browser does not support this type of export. You can export to a communications or printer port with CatME, and this will be available in the Connexion client (June 2003).

Export to a File

Do you export to a file and then load the file into your local system? CatME, Connexion browser, and Connexion client (June 2003) all support this function. However, please note the following:

- When exporting to a file from the Connexion browser (with the exception of the Express tab), you cannot append to a file. Each time you export, a new file is created. However, you can save records and export groups of saved records at one time to create a single file that contains multiple records.
- One option for getting a single file of records to load into your local system is to get your records through a daily OCLC-MARC Subscription file instead of using the Export command. Contact the MINITEX BATS unit for more information about this option.
- When exporting from the Express tab in the Connexion browser, the record is added to an authorization-specific file of records at OCLC. As you do additional exports, the records are appended to the file. At the end of your session, you download the file of records exported with your authorization number. However, the Express tab in Connexion provides simplified cataloging, which supports limited record editing and export of bibliographic records.
- CatME allows you to export records to a file and append records to an existing file. You can export single records at a time or export groups of records.
- The Connexion client will allow you to export records to a file and append records to an existing file. Phase 1 of the client will support exporting single records at a time. Later, you will be able to export groups of records at one time.

NACO Functionality

Are you a NACO participant who creates and replaces authority records? CatME, Connexion browser, and Connexion client all support this function. However, please note the following:

- The Connexion browser supports NACO functions. If your records are reviewed by a NACO trainer/reviewer, you cannot put your records in your save file and have your reviewer change to your file to review the records as is done in Passport. You must either e-mail the records to your reviewer or give your reviewer your authorization number and password. OCLC will add support for reviewing records later this year.
- CatME supports NACO functions. If you have your records reviewed by a NACO trainer/reviewer, you cannot put your records in the online save file; CatME does not have access to the online save file. You must e-mail the records to your reviewer.
- Connexion client, the second release (3d quarter 2003), will support NACO functions as listed above for the Connexion browser.

Keyboard and Mouse

Do you use the keyboard in most cases? The mouse? Or both? With the Connexion browser, you can do most functions with the keyboard, including customizing actions to keystroke shortcuts. However, you must also sometimes use the mouse. With CatME and the client (June 2003), you can perform all functions with the keyboard, or you can mix using the keyboard and the mouse.

Label Printing

Do you print labels with Passport? CatME, Connexion browser, and Connexion client (June 2003) all support label printing. You can continue to display labels, make edits, and print labels in the OCLC formats (SL4, SL6, SLB, SP1) as you do with Passport. Additionally, you can specify print constants, ranges, and copy numbers, and print multiple copies. You can print labels to a printer, or you can create a file of labels to import into the OCLC Cataloging Label Program or other label printing software.

The browser uses the Label Program for printing labels. When you display a label in the browser, the system automatically opens the Label Program if not already open and displays the label.

When moving from Passport, you might need to upgrade printer drivers for use with label printing. However, label printing is similar in CatME, the Label Program, the browser, and the client, so the same drivers will work with any of these.

[David Whitehair, OCLC, *Bits and Pieces*, Feb. 2003]

Canadian Provinces and Territories—State Code Abbreviation Standardization

To match the official Canadian abbreviations, on Tuesday, Jan. 28, 2003, OCLC changed the following state code abbreviations for the following Canadian Provinces/Territories:

Province or Territory	Previous Abbr.	Changed to	New Abbr.
New Brunswick	NK	<i>Changed to</i>	NB
Prince Edward Island	PI	<i>Changed to</i>	PE
Quebec	QU	<i>Changed to</i>	QC
Saskatchewan	SN	<i>Changed to</i>	SK
Yukon	YK	<i>Changed to</i>	YT

The location displays in the following utilize these new abbreviations:

- OCLC Cataloging
- OCLC Connexion
- OCLC FirstSearch
- OCLC Interlibrary Loan
- OCLC Union Listing

The abbreviations used in *Participating Institutions* have also been changed.

Please note: These codes are NOT used for input in fields 008 and 043. They are used only in profiling and holdings displays.

Making this change brings consistency to all places in OCLC systems that use Canadian Province/Territory abbreviations.

[Chris Grabenstatter, OCLC, *Bits and Pieces*, Feb. 2003]

Ingram Library Services and the OCLC PromptCat Service

The PromptCat vendor Ingram Library Services offers a broad range of adult and children's hardcover books, trade paperbacks, publishers' library bindings and mass-market paperbacks as well as reference, technical, professional and large print titles.

<http://www.ingramlibrary.com/>

PromptCat is an effective, affordable way to automate much of the copy cataloging performed for new materials. With PromptCat, new items ordered through participating vendors arrive with complete OCLC-MARC records and library holdings are automatically set in WorldCat.

To learn more about PromptCat, please visit:

<http://www.oclc.org/oclc/menu/prompt.htm>

[Beth Fogler, OCLC, *Bits and Pieces*, Feb. 2003]

News about Active OCLC PromptCat Vendors

Seventeen active OCLC PromptCat vendors collaborate with OCLC to meet the needs of academic, public and special libraries, including medical and music libraries. PromptCat serves libraries in the US, Canada, the UK and worldwide. For a complete list of PromptCat vendors, please visit:

<http://www.oclc.org/oclc/prompt/vendor.htm>

Is your favorite vendor missing from this list? Let us know. Recommend a new vendor for PromptCat by sending e-mail to Beth Fogler, beth_fogler@oclc.org.

[Beth Fogler, OCLC, *Bits and Pieces*, Feb. 2003]

Catalogers Needed for OCLC WorldCat Collection Sets

Volunteers are needed to catalog microform or electronic sets to be included in OCLC WorldCat Collection Sets. Catalogers are given a special symbol and authorization to use for cataloging only the specified set of records. All records cataloged using this special symbol are collected into the set. Searches, updates, and replaces are free of charge, and catalogers receive regular cataloging credits. If you have a set of items you plan to catalog and are interested in participating in this cataloging program, please contact Susan Walker at walkers@oclc.org.

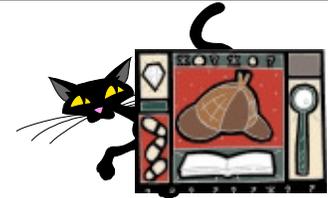
For a complete listing of available record sets and additional information, see the Collection Sets Web site at:

http://www.stats.oclc.org/wcs_list.html

[Susan Walker, OCLC, *Bits and Pieces*, Feb. 2003]

MINITEX CONTRACT CATALOGING

There's No Place Like Holmes - Part 2



Last month, we presented Project background and statistics for our work in cataloging the University of Minnesota Libraries, Twin Cities' Sherlock Holmes Collection. In this and the next three issues of the *MINITEX/OCLC Monthly Mailing*, we will talk about challenges and suggestions concerned with organizing a cataloging project for a special collection plus some personal reflections on this specific collection.

Until a month or so before the Project's end, we were in and out of the caverns of the Andersen Library where much of the collection is housed. The last few weeks, we were in the aisles of the James Ford Bell Library vault on the fourth floor of Wilson Library. The vault became temporary residence for the Project's cataloging residue – those things that always sink to the bottom to “deal with later” (for us, it was 10 ranges).

We suspected this early on in the Project when we claimed a locked black cabinet in the MAC (Materials Acquisition & Control) area of Wilson Library to put “on-hold” items that we “didn't know what to do with.” Over the months (and years), we set up some possible categories for collection-level records. These included such items as: meeting programs and souvenirs, advertising, tourist and travel brochures, holiday greetings and cards, invitations, toasts (non-edible), memorials, publishers' and booksellers' catalogs, auction catalogs, book jackets (no book), and, of course, the ever popular -- miscellaneous. We also set aside manuscripts, conference proceedings, dummies and forgeries, and finally, parts of sets, that we hoped would find their accompanying parts throughout the Project. Some did. Some didn't and now stand as lonely, incomplete parts of the whole, “wanting v. x.”

Sounds like our sorting process of the final residue would fit into the categories that we devised early on — how many categories could there be? For the Sherlockian, infinite.

As a cataloger, do we consider format? content? cataloging issues? Sherlockian research? Should we just organize according to De Waal's categories from TUSH (*The Universal Sherlock Holmes* -- <http://special.lib.umn.edu/rare/ush/ush.html>)? We came up with the following categories and counts (all but 6 categories had some or many items with De Waal numbers, which are a priority for cataloging and retrieval):

Categories of “Left-over” Holmesian materials

- Ads
- Analytics (non-comic)
- Analytics in comic books
- Book & nonprint catalogs, bibliographies, indexes, auction catalogs
- Book reviews
- Calendars
- CJK
- Collections of photocopied materials, non-published
- Comic strips
- Dummies, frauds (e.g., titles that a collector has requested be bound with a spine title – but often blank pages, or pages the binder had laying around—like ChemAbstracts; these titles were merely mentioned in a Sherlockian work but for the collector is to be collected.)
- Ephemera
- Exhibits
- Gillette
- Greeting cards
- Individual monographs
- Meetings, seminars
- Miniatures (about)
- Movie/TV/film production materials
- Museums, collections in libraries, homes
- Music scores
- Newsletters
- Nonprint
- Non-Roman
- Offprints
- Postcards
- Puzzles/Crosswords
- Radio production material
- Scripts: Movie/TV/Film/Radio
- Serials
- Short nonprint references direct (have you seen the Kemps’ cow billboard?)
- Short nonprint references indirect (e.g., picture of a person that happens to be named Irene Adler)
- Short references to scions
- Short verbal references direct (e.g., short mention of Doyle or Holmes characters)
- Short verbal references indirect (e.g., person named Holmes or Watson is mentioned)
- Starrett boxes
- Substantial Christmas greetings (monograph nature)
- Theater production materials, playbills, brochures, packets, articles, monographs
- Trifling monographs (e.g., 2 leaves, fold.)
- Unknown

TOTAL (as of 10/31/02): 319 inches of “collection-level” candidates, plus 2,642 items of “individual record” candidates

As we started sorting through storage trays (and trays and trays) of skinny Hollinger envelopes, individual periodical issues, newspaper clippings, etc., it became more difficult to decide on which category should become home for certain items. For example:

- An old thermal copy of a typescript pastiche, which was presented at a scion meeting and later published as an article in *Baker Street Journal*

- A single leaf containing a limerick about Holmes written by a famous member of a scion, printed by a small press, which was given out during an exhibit of U. of M. Holmesian memorabilia at a conference held on the Minneapolis campus
- A dinner menu printed specially for the annual meeting of the Baker Street Irregulars, which has a musical score about Holmes on the back that the members sang after dinner
- An offprint of a play script from a scion newsletter, the play being a Sherlockian pastiche, originally presented at a Christmas meeting of the scion; copies were also sent as a Christmas card greeting to the writer's Sherlockian colleagues (you think we're kidding?)
- The original and only copy of a game that is handwritten on 4x6 index cards to be played at a scion meeting
- A review of a play published in *The Playgoer* from 1904—the play is a pastiche (Sheerluck Jones, or, Why D'Gillette him off?) starring Clarence Blakiston whose “imitation of William Gillette is marvelous”

The questions were absorbing and endless:

- Is it right to put a pristine copy of a 1904 periodical into a collection-level pile? Will it be lost for its own value?
- The Sherlock Holmes trading cards went with “visual”, but an article comes along that is barely one paragraph with illustrations of the trading cards — would we lose this in “brief verbal/visual reference” collection-level?
- What is “brief”? A word, a paragraph, one column, two pages?
- When a book review goes over 1-2-3 pages, does it become an analytic?
- Is a single leaf poem by Vincent Starrett printed on parchment in script a trifling thing? At what point is an item “brief, frivolous, trifling”? For the Sherlockian, never!
- What exactly are ephemera within the context of a special collection? (are the jar labels for Holmes-made Honey ephemeral to the Sherlockian enthusiast? We think not!)

When cataloging a current trade publication, there is a central theme or two; you can usually narrow the 650's to 3-5 and the 7xx's to 1-2 quite easily and determine a call number. For this collection, each element seemed to cry out for representation -- a single leaf containing a **limerick** about **Holmes** written by a **famous member of a scion**, printed by a **small press**, given out during an **exhibit of U. of M. Holmesian memorabilia** at a conference held on the **Minneapolis campus**.

Next month, look for some ways we handled these questions.

[Sue Landgraaf and Kay Beaudrie, MINITEX]

RESOURCE SHARING

OCLC Group Membership Requirement Removed for Entering Union List Local Data Records (LDRs)

OCLC traditionally has required a library to belong to a Group Access or Union List group (GACs, GAC/UL, or UL-only) to enter union list holdings information (also called Local Data Records or LDRs) in the OCLC Union List service. Until recently, libraries could only view union list data as a result of issuing a group holdings command in the OCLC Interlibrary Loan (ILL) service. This holdings information is now visible in several different locations:

- “Libraries that Own Item” displays from bibliographic records in the WorldCat database on the OCLC FirstSearch service.
- “Pending” requests in a library’s own OCLC ILL transaction file.
- Union List holdings displays (ULxxxx) from within the OCLC ILL service.
- Custom Union List displays (dhu) from within the OCLC ILL service.

Because union list holdings are now visible in these multiple locations, OCLC has removed the requirement that a library must belong to a group to enter union list holdings in the OCLC Union List service.

For more information about entering your library’s union list holdings so they are visible in these multiple locations, contact the MINITEX/MULS office (800-462-5348, 612-624-4002).

[Cathy Kellum, OCLC, *Bits and Pieces*, Feb. 2003; edited]

Update Your Union List Holdings via Batch Services—Evaluation Fee Waived Through June 2003

Libraries wishing to update their local data records (LDRs) (i.e. holdings information) in the OCLC Union List service can find information at the OCLC Batch Processing Web site at:

<http://www.oclc.org/batchprocessing/localdatarecords/>

MINITEX/OCLC Mailing, March 2003

The regular batch evaluation fee is waived for data compliant with the MARC 21 Format for Holdings Data through June 2003. A nominal fee is charged for evaluating patterned data submitted in non-MARC formats. Libraries must request to have their holdings batchloaded before June 30, 2003 to take advantage of the promotion. A library may submit batch files on a regular schedule of its choice, or update with a one-time batch project and, then, maintain LDRs online through the OCLC Union List service at:

<http://www.oclc.org/oclc/menu/union.htm>

Contact Cecelia Boone (800-462-5348, 612-624-6353, c-boon@tc.umn.edu) for more information.

[Cathy Kellum, OCLC, *Bits and Pieces*, Feb. 2003]

Union List Holdings Now Available from WorldCat Records in OCLC FirstSearch Service

Holdings information, as recorded in Local Data Records (LDRs) in the OCLC Union List service, is now accessible from within the WorldCat database on the OCLC FirstSearch service. Users of WorldCat on FirstSearch will see union list data for their institution on the detailed record display and for other institutions when holdings are displayed from a WorldCat serial record.

This enhancement significantly improves FirstSearch users' ability to locate information in the collections of their own libraries and will streamline the users' searches by incorporating a critical level of detail into the holdings display.

This enhancement also:

- Protects and leverages the investments libraries have made in their serials collections, in union listing, and in their consortia.
- Enhances libraries' stature with funding authorities and user communities by increasing awareness of and broadening access to collections.

The default setting for the display of union list data in the administrative module is *on*. Libraries have the choice of turning off the display of their union list holdings information for all FirstSearch users. If an institution chooses to turn the display of union list information off, no union list information for that symbol will display to any FirstSearch users, including their own.

Libraries should be encouraged to add or update local data record information. They can take advantage of assistance available to get and keep the records updated. (See preceding article "Local Data Record (LDR) Updating via Batch Services Evaluation Fee Waived Through June 2003" in this issue of *Bits & Pieces*). Contact Cecelia Boone (800-462-5348, 612-624-6353, c-boon@tc.umn.edu) for more information.

[Cathy Kellum, OCLC, *Bits and Pieces*, Feb. 2003; edited]

OCLC ILL Web—Optimum Performance Recommendations

OCLC has recently published recommendations to facilitate the best possible access to the ILL Web interface. Use these recommendations as guidelines when you use ILL Web.

Category	Recommendation	Notes
Hardware	450 MHZ Pentium Processor	Earlier (slower) Pentium processors will work, but less efficiently. Use at least the recommended processor speed for your operating system. Do not use Pentium processors with speeds below 166 MHz.
Memory	64 MB RAM	Newer operating systems such as Windows 2000 or Windows XP run more efficiently with 128 MB or more.
Web Browser	Internet Explorer version 5.5, 6.0 or higher. Netscape 7.0 or higher..	OCLC strongly recommends use of the most recently released version of Internet Explorer. IE Versions 5.0 and 5.01, and Netscape 6.1 and 6.2 are also supported.
Windows	Windows 2000 and Windows XP	Windows 98, Windows NT, and Windows ME are also supported.
Internet Connectivity	High-speed (100kbps) connections	These will perform significantly better than low-speed connections. The definition of a ‘high-speed’ or ‘broadband’ connection that will serve these needs is one that is always on and provides each user with a minimum effective bandwidth of 100 kbps (i.e. about double the speed of a “perfect” dialup connection). A multi-user network should, on average, be able to provide roughly the same throughput that a stand-alone user would obtain.

For more information, contact The MINITEX Bibliographic and Technical Services Unit (800-462-5348, 612-624-4002, mino@othello.lib.umn.edu)

[Cathy Kellum and Judith Carter, OCLC, *Bits and Pieces*, Feb. 2003]

OCLC ILL Library Policies Directory

The OCLC ILL Library Policies and Technology Directory is now available! This Web-based directory is taking the place of the OCLC Name-Address Directory (NAD) as the home for your ILL policy, contact, and site information. The Policies Directory can be accessed from ILL Web at:

<http://illweb.oclc.org>

MINITEX/OCLC Mailing, March 2003

From ILL Web, click the Policies Directory link located in the top black menu bar on every ILL Web screen. Users are welcome to enter policies, contacts and site information for their institutions. ILLiad users will have access from the ILLiad client in the March release of version 6.2.

The OCLC ILL Policies Directory features an Advanced Searching capability. This functionality includes such features as searching by group, network, geographic location, supplier status, delivery method, support for rush deliveries, and more.

The Policies Directory will replace the Name-Address Directory (NAD) for ILL use only. The ILL policy fields in the NAD will be retired during the 3rd quarter of 2003. No information will be migrated from the NAD to the Policies Directory. Basic institution information will be provided for every member library to seed the database. Policies, contacts and additional site information need to be added by ILL users.

For libraries in Minnesota that responded to the MINITEX ILL Policies survey, MINITEX staff will use that information to create preliminary records in the OCLC ILL Policies and Technology Directory. When we have created the preliminary record, we will contact you, highlight any questions we have about the data, and ask you to review, correct and complete the entry.

For libraries in North and South Dakota, and others for whom we do not have an existing database of information, we plan to provide Webinar training sessions with guidance on how to enter data into the Policies Directory.

For more information on using the ILL Policies Directory, contact the MINITEX Bibliographic and technical Services Unit (800-462-5348, 612-624-4002, mino@Othello.lib.umn.edu) or go to the ILL Policies website at:

<http://www.oclc.org/oclc/ill/illpolicies.htm>

A new reference card called *Getting Started with the OCLC ILL Library Policies and Technology Directory* is also available at this web address.

If you are excited about the Directory and can't wait to get started, please feel free to try it out!

[Mark Tullos, OCLC, *Bits and Pieces*, Feb. 2003 and Carla Dewey Urban, MINITEX; edited]

REFERENCE SERVICES

OCLC FirstSearch Customizing Tip: Display All Libraries

Did you know that you can give your users the option to view the holdings of all OCLC member libraries in FirstSearch? It is easy to turn on the link to display all libraries' holdings information. All you need to do is:

- Go to <http://firstsearch.oclc.org/admin?firstpg=LibraryHoldings>
- Enter your FirstSearch administrative authorization and password on the administrative module login screen.

You will be taken directly to the **Interface Display => Library Holdings** area in your FirstSearch administrative module, where you can enable the **Display All Libraries** link. Select **Display All Libraries** by placing a check in the box to specify that users can view holdings information for all libraries. You must also select System Default, Regional, or Group (in Library Holdings Display) to select **Display All Libraries**. When your users bring up a holdings screen, they will be able to click the link to see the complete display of all holding libraries.

Benefits of displaying all libraries' holdings information in FirstSearch:

- Facilitates comprehensive research by letting users view the list of all OCLC member libraries worldwide that hold an item. Academic faculty, graduate students, and genealogists will appreciate knowing where all items pertinent to their research are located.
- Helps library staff with collection development. By seeing all libraries that own an item, staff can make informed acquisitions decisions and stretch their budget resources.
- Supports the expanding needs of libraries to serve users not located geographically near their home libraries.
- Expands the choices available to FirstSearch users for locating library holdings information.
- Allows libraries to customize FirstSearch to better meet the needs of their specific user populations.

Questions? Online help is available for this feature. You can also contact Karen Docherty at MINITEX (800-462-5348, 612-624-4002, kdochert@tc.umn.edu) or OCLC User and Network Support (1-800-848-5800 or support@oclc.org).

[Joan Giglierano, OCLC, *Bits and Pieces*, Feb. 2003]

Holdings Display Enhancements in FirstSearch

Names, locations, and OCLC symbols of users' home libraries make up custom groups set up by the home library in the FirstSearch administrative module. They are now highlighted with colored text and the *My Library* or *My Library Group* icon in the holdings displays that follow search results screens. If the user's home library is among the holding libraries, its name appears at the top of the list, and a new icon is placed next to the home library's name in the holdings display. It lets users jump straight to the library's OPAC to check on local availability of items they find in their searches, provided the library has set the link to its OPAC either through HTTP linking or Z39.50. These enhancements help users see easily that their library and/or affiliated libraries own an item, making local collections more visible. They also can more readily see the shelf status of an item.

[Joan Giglierano, OCLC, *Bits and Pieces*, Feb. 2003]

Union List Data Now Visible on Display All Libraries Screens

Holdings information as recorded in Local Data Records (LDRs) in the OCLC Union List service is now accessible from the Display All Libraries holdings screen for all users of WorldCat on FirstSearch, as well as on the initial holdings screen. Users of libraries that access FirstSearch via the Z39.50 protocol will be able to see union list data for their institution on the Detailed Record screen, and for other institutions when holdings are displayed from a WorldCat serial record. In addition, clicking the LDR column heading on this screen will sort the entries by LDR, making it easier to see the libraries that provide year and volume holdings information.

[Christa Starck, OCLC, *Bits and Pieces*, Feb. 2003]

***Find Items About* Feature on FirstSearch WorldCat Database Provides Additional Links**

New *Find Items About* links that lead to records for other works about the titles or authors of items retrieved in a search now appear in WorldCat detailed records on the OCLC FirstSearch service. These links launch additional subject searches for the title or author's name and can lead to records of works such as criticism, biographies, autobiographies, collections of essays, etc. The links provide a convenient way for users to expand their original searches and locate related items of interest. The links also demonstrate the depth of WorldCat to those less familiar with WorldCat and library collections. A click on any of these links counts as a search.

[Joan Giglierano, OCLC, *Bits and Pieces*, Feb. 2003]

WorldCat Database Features Links to Essay and General Literature

Detailed records in WorldCat on the OCLC FirstSearch service now include new links that make it easy for users to get to related information contained in anthologies indexed in the Essay and General Literature Index database. These links appear in the area labeled *More About This In* on the detailed record display. The links display when no table of contents data is present in the WorldCat record if the library provides access to both WorldCat and the Essay and General Literature Index database. No further action is required to activate these links, which cannot be turned off. Clicking a link counts as a search as does further searching done in the linked Essay and General Literature Index database.

[Joan Giglierano, OCLC, *Bits and Pieces*, Feb. 2003]

EventLine Database To Be Discontinued

Excerpta Medica has informed OCLC that it will not update its EventLine database on OCLC FirstSearch and alternative information services after March 2003. Consequently, per-search and subscription access to the EventLine database will be discontinued on FirstSearch effective April 1, 2003. Current subscriptions to the EventLine database will be honored for their full terms.

[Christa Starck, OCLC, *Bits and Pieces*, Feb. 2003]

Setting Up “Virtual Catalogs” with OCLC FirstSearch

A new “virtual catalogs” feature in the Interface Display section of the FirstSearch administrative module allows libraries to set up persistent cross-database searching. FirstSearch administrators can combine WorldCat plus one or two other FirstSearch databases so they appear as one database in the interface. Once a virtual catalog is set up in this way, the FirstSearch administrator can give it a name of his/her choice. For example, a library might combine WorldCat, *Books in Print*, and *Book Review Digest* and call the combined database *Books*.

[Christa Starck, OCLC, *Bits and Pieces*, Feb. 2003]