OCLC Reports

Did you ever mutter under your breath about those arcane OCLC MUTRS (Marketing Usage Trends Reporting System) reports that showed up once a quarter with your OCLC invoice? Good news! OCLC is replacing them with a new and improved report called OCLC Product Usage Statistics (OPUS).

Available electronically, the OPUS report will contain statistics for the current and previous fiscal years, including every product code your institution uses (unlike MUTRS which only covered 128 product codes). The report will be available in a Web-viewable format as well as in a tab-delimited downloadable format so you can plug the data into a spreadsheet application and crunch numbers to your heart's content.

The first OPUS reports will be available on Oct. 8 by 5 p.m. Eastern time, and the September MUTRS report included with your OCLC invoice will be the last printed one you will receive. To access OPUS, go to <http://psw.oclc.org>, click on Records and Reports, enter a valid OCLC authorization and password, and click on the link for OCLC Product Usage Statistics.

We'll be including a flier with more detailed information with your September MINITEX/OCLC billing statement. If you have any questions, please feel free to contact the MINITEX BATS unit!

[Carla Dewey Urban, MINITEX BATS]

Passport UL – It's Not Dead Yet!

By now you probably have heard that OCLC Union List activity is going to migrate from our familiar Passport UL system to a new platform and user interface. While nobody is sure exactly what the new system will look like yet, OCLC has recently announced a timeline for the migration. The change is expected in June of 2005, and circumstances require that we make a "hot cut-over" from Passport to the new Union List system.

There will be many changes to the Union List system, and we anticipate that the new system will be easier to use than the old, DOS-based Passport system. As development proceeds, we will keep our member libraries up-to-date. And, of course, MINITEX will provide training on the new interface to our member libraries.

Meanwhile, with the end of Passport Union Listing on the horizon, many libraries are considering what should be done regarding maintenance of their serial holdings records

in MULS. The MINITEX MULS unit staff encourages all libraries participating in MULS to continue updating their holdings in the Union List system for a number of reasons:

1) Current holdings in the Union List are used for ILL activity. If holdings are out-of-date, it wastes both staff and patron time when borrowing requests are sent to inappropriate lending institutions.

2) Updates to the OCLC Union List are immediately available through OCLC WorldCat and FirstSearch, and have an immediate impact on the usefulness of this resource.

3) Many libraries have not kept up with Union List activity due to changes in their local and/or regional catalogs. Waiting until the new OCLC Union List interface is implemented would only extend the lack of current information.

4) Holdings which are in the Union List system prior to implementation of the new system will automatically be transferred (via a batch process) to the new system and the new holdings statement standard. We anticipate significant changes to the format of Local Data Records (LDRs), so taking advantage of the batch transfer could save you the work of updating holdings manually while learning and implementing the new format.

If your library's holdings in OCLC are in need of updating, please take some time to make them current. If you need help, the MINITEX MULS unit staff will be glad to assist you with your updating project. If your staff need training or a refresher in UL updating, two MULS Webinars are being offered this fall (see the Training and Conferences page of the MINITEX web site). MULS unit staff will also be happy to assist you with updating strategies, using macros, or other specific problems. Please feel free to give us a call! (See contact information at the end of this *Mailing*).

[Dave Linton, MINITEX MULS]

Did you know ...?

When AACR2 was developed, the decision was made to substitute the international abbreviation "s.l." (for *sine loco,* "without a place") for the Anglo-centric "n.p." (for *no place*). In looking at rules 1.4C1-1.4C6, you'll note that occasions when one uses "s.l." are limited. Rather than using it any time the place of publication does not appear on the title page, the cataloger has to consider and reject a number of possibilities before it is appropriate to use "s.l." Those possibilities (in order of application) are:

1. If the place of publication appears in the prescribed source for "Publication, distribution, etc." information (for books, that is the title page, the other preliminaries, or the colophon), record it as it appears there, applying abbreviations for state, etc., names from Appendix B as appropriate:
	New York City, N.Y.;
2. If it doesn't appear in the prescribed source, but it can be supplied from another source, record it within square brackets:
	[Minneapolis, Minn.];
3. If it can't be supplied from another source, but the probable city of publication can be given, give it in square brackets:
	[Mobile, Ala.];
4. If the probable city of publication is uncertain, give it in square brackets followed by a question mark (note, when giving both the name of a city and the name of a larger entity, such as the state, the question mark follows the name of the city, not the name of the larger entity):
	[Lomma? Sweden];
5. If the probable city can't be given, give the name of the state, etc., in square brackets (in this and the following cases, the use of abbreviations from Appendix B is not permitted):
	[Minnesota];
6. If the probable state, etc., is uncertain, give it in square brackets followed by a question mark:
	[California?];
7. If the probable state, etc., can't be given, give the name of the country in square brackets:
	[United States];
8. If the probable country is uncertain, give it in square brackets followed by a question mark:
	[England?];
9. If all the possibilities in steps 1-8 above have been considered and rejected, then you may use
	[S.l.].

(This is one in an occasional series of cataloging tips and hints brought to you by the ConCats)

CATALOGING & METADATA

When Should You Migrate to OCLC Connexion?

If you haven't already heard, here's the scoop:

➢ Passport for Cataloging is going away on May 1, 2005. Really and truly. No fooling.

- ➤ CatME as well as CJK and Arabic are going away July 1, 2005. Poof! Gone.

So, when should you migrate? When will OCLC Connexion have what you need?

- ➤ Passport for cataloging users can migrate now! Both Connexion interfaces (browser and client) have everything you need, with the following exceptions:
  - ▪ Connexion browser does not have macros. If you use macros you should move to the Connexion client.
  - ▪ Connexion client does not yet have full NACO functionality. This will be available with version 1.20 (November or December 2004).

- ➤ CatME users will be able to migrate to the Connexion client by the end of this year (December 2004). Version 1.20 of the client, to be released in November or December 2004, will have what you have been waiting for: offline cataloging, local save files, and batch processing!
  - ▪ See the full list of enhancements included in version 1.20 at: <http://www.oclc.org/connexion/interface/client/enhancements/future.htm>

- ➤ CJK users will be able to migrate to the Connexion client by the end of March 2005. Version 1.30 of the client, to be released during the 1st quarter of 2005, will include CJK.

- ➤ Arabic will be added to the Connexion client in version 1.40, to be released during the 2nd quarter of 2005.

Do you need to migrate all at once? No! If you prefer, you can try out the browser and/or the client while still doing some of your cataloging on Passport or CatME. However, you do need to keep in mind that the Connexion Save File is separate from the Online Save File accessed by Passport and CatME. And, of course, you need to remember the end-of-life dates.

Please see and make use of the "OCLC Cataloging" handout that accompanies this *Mailing*. Take note of the things you need to consider before migrating, try out the tutorials, read the tips. And don't hesitate to contact the MINITEX BATS unit if you have questions or need help (see contact information at the end of this *Mailing*).

[Virginia Dudley, MINITEX BATS]

OCLC Connexion Features

Both the browser and client interfaces of OCLC Connexion are packed full of features that you may not know about, or have maybe forgotten about. We will list a few of these in each issue of the *Mailing* in order to jog your memory and to help you make efficient use of Connexion.

CONNEXION BROWSER FEATURES

- You can retain the LC call number in a new derived record. In fact, in "Preferences," you can define what fields transfer when deriving a new record. GENERAL tab→Admin Options→Preferences→Cataloging Options. Scroll down to "Derive Record Fields."

- Link directly to Bib Formats & Standards. You can easily jump to the page describing a specific fixed field element or variable field tag right from your record in the browser. You can do this in various ways:
    - Enter fixed field element or variable field number in the MARC Help box (at top of record) and press <Enter>.
    - Click the fixed field element name or press <Tab> till you get to the fixed field element name and then press <Enter>.
    - For variable fields in MARC Template view: in the Functions list next to the variable field, select Help.

CONNEXION CLIENT FEATURES

- Remembering your last search: The system automatically retains your last 10 command line searches. However, to have the system remember your last Keyword Search, you must check the Retain Search box in the Search dialog. (There is also a Retain Search box connected to the Numeric Search and Derived Search dialog.)

- Link directly to Bib Formats & Standards. You can easily jump to the page describing a specific fixed field element or variable field tag right from your record in the client. You can do this in various ways:
    - Fixed field elements: Click the fixed field element name -OR- or press <Tab> till you get to the fixed field element name and then press <Enter>. Alternatively, with the cursor in the fixed field element, use the menu item Help→MARC Field Help, -OR- the keystroke <Shift><F1>, -OR- the right-click mouse menu.
    - Variable fields: With the cursor in the variable field, use the menu item Help→MARC Field Help, -OR- the keystroke <Shift><F1>, -OR- the right-click mouse menu.

MARC Record Size

One of the benefits of Connexion is the ability to create large records as opposed to the limit of 4,095 characters per record via Passport and CatME. Unfortunately, OCLC's MARC output has not yet been modified to handle the larger records created in Connexion. As a result, if a large record (greater than 4,095 characters) is created in Connexion, it will be truncated when it is output through OCLC MARC Subscription Service, WorldCat Collection Sets, GovDoc, PromptCat and Bibliographic Notification. This situation should affect a very small percentage of records, and we expect to resolve it by June 2005 when MARC record output will be able to handle any record of any size created in Connexion.

A suggested workaround for MARC Subscription users is to export large records from Connexion so you are sure to get the full record in your local system.

OCLC apologizes for any inconvenience this may cause. Please feel free to contact MINITEX BATS with any questions you may have.

[Jim Simms, OCLC-Cat listserv, 9/10/2004; edited]

RESOURCE SHARING

When Should You Migrate to WorldCat Resource Sharing Staff View?

First, some facts:

> OCLC's new name for its Interlibrary Loan Service is WorldCat Resource Sharing.

> Passport for ILL, ILL Web, and ILL ME will cease to exist as of May 1, 2005.

> WorldCat Resource Sharing staff view is being developed on the FirstSearch platform in order to take advantage of many FirstSearch features. However, the service itself is separate from the FirstSearch service.

So, when should you migrate? When will the WorldCat Resource Sharing staff view have what you need?

- ➢ ILL Web users
  - ▪ You can migrate right now if your library has access to FirstSearch.
  - ▪ All ILL Web functionality is currently available in the new interface.
  - ▪ By mid-October, any OCLC ILL users, with or without FirstSearch access, will be able to use the new interface.

- ➢ Users of Passport for ILL and ILL ME
  - ▪ Between now and April 2005, high-productivity features and functionality, including batch processing, will be added to the new interface.
  - ▪ See the list of upcoming enhancements at: http://www.oclc.org/ill/migration/enhancements_upcoming.htm> And watch for further news of enhancements.

- ➢ ILLiad users
  - ▪ Versions 6.x will be retired on May 1, 2005.
  - ▪ Version 7.0, to be released in December 2004, will include seamless interaction with the new interface.

Some questions you might have:

- ➢ Do I need to migrate all at once?
  - ▪ No! You may use a combination of Passport, ILL Web, ILL ME, and the new WorldCat Resource Sharing Staff View. Just keep in mind the end-of-life dates.

- ➢ Our library has a FirstSearch account. After mid-October, do we need to link our ILL authorization to our FirstSearch account?
  - ▪ No. However, if you would like to be able to create requests from FirstSearch databases your library is subscribed to (other than WorldCat), you will need to link your ILL autho to your FirstSearch autho.

- ➢ How do I link my ILL authorization to my FirstSearch account?
  - ▪ See the tutorial at: <http://www.oclc.org/ill/migration/quickstart_sharing_staffview.pdf>

MINITEX will soon be offering Webinars on the new interface. Meanwhile, please see and make use of the "WorldCat Resource Sharing" handout that accompanies this *Mailing*. Read up on the new WorldCat Resource Sharing Staff View and try out the Staff View tutorial. Please contact the MINITEX BATS unit if you have questions or need help (see contact information at the end of this *Mailing*).

[Virginia Dudley, MINITEX BATS]

ERIC Database: Upcoming Changes

Several changes to the ERIC database on FirstSearch are scheduled to be implemented on Oct. 1, 2004:

1. The ERIC database will now be produced by the Computer Sciences Corporation (<http://www.csc.com>).

2. Over 107,000 full-text non-journal documents (issued 1993-2004), previously available through the ERIC Document Reproduction Service (EDRS), will now be available at no charge. All full-text content freely available through the ERIC website will also be available through the FirstSearch version of ERIC. EDRS is scheduled to discontinue on-demand and subscription based document delivery services on Sept. 30, 2004.

3. The ERIC database was last updated in July 2004 and the next update is scheduled for Dec. 2004 after which monthly updates are planned. In December, 2004, ERIC will begin to add new bibliographic records and full-text journal and non-journal resources published in 2004.

4. ERIC will continue to provide access to the thesaurus data.

Please note that there will be no pricing or other changes to how the ERIC database is offered on the OCLC FirstSearch service nor will there be any changes in search functionality.

Please contact Karen Docherty at MINITEX with questions. (See contact information at the end of this Mailing.)

OCLC Product Updates, 09/21/2004

Contact Information

MINITEX Bibliographic and Technical Services (BATS), 612-624-4002, 800-462-5348, mino@othello.minitex.umn.edu
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