

OCLC2003**News From OCLC**

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General News**OCLC Registry and Metadata Services (Bill Carney)**

The OCLC Rights & Resolutions initiative is currently in the analysis and design phase. The team is scheduled to deliver a complete requirements document in April of 2003. This initiative is focused on creating a cooperatively developed central repository of rights metadata designed to help libraries manage their electronic and print-based content. Contact Bill Carney, Product Portfolio Manager for more information.

Collections and Technical Services**Changes to 245 Subfielding Practice**

In MARC 21 Update No. 2 (October 2001), the Library of Congress made a subtle change to subfielding practice for field 245, allowing subfield \$n (Number of part/section of a work) and subfield \$p (Name of a part/section of a work) to follow subfield \$b (Remainder of title) as well as precede it. Appropriate adjustments have been made to both the PDF and HTML versions of "Bibliographic Formats and Standards," 3rd edition and will be included in the next set of print revision pages. For details, see OCLC System News.

OCLC-MARC Format Update 2002

The OCLC-MARC format changes announced in Technical Bulletin 247 "OCLC-MARC Format Update 2002" (<http://www.oclc.org/technicalbulletins/247/>) became effective 2002 December 1. In addition to the bibliographic format changes and the newly defined codes, users should follow the new practices for coding field 041 (Language Code) and for cataloging integrating resources that are outlined in TB 247. Please see Technical Bulletin 247 and OCLC System News for additional details.

DVD Code "v" for 007 Subfield \$e

On 2002 December 1, a new code "v" specifically for DVD format videorecordings was implemented for the Videorecording 007 field subfield \$e (007/04). The new code "v" is to be used to identify all DVD videos. DVDs use the digital PCM (Pulse Code Modulation) technique to represent video information on a grooveless, smooth, round plastic disc. Most DVDs are 4 3/4 inch in diameter, although some smaller 3 inch discs have also been commercially produced. DVDs have been commercially available only since 1996. The existing Videorecording 007 subfield \$e value "g," previously defined as "Laser optical (reflective) videodisc," has been redefined more narrowly as "Laserdisc." Code "g" is now to be used only for videodiscs that use the analog PWM (Pulse Width Modulation) technique to represent video information on a grooveless, smooth, round plastic disc. Laserdiscs exist in three standard commercially produced sizes: 12, 8, and 4 3/4 inch. The 12 inch discs are the most common, typically used for movies. These analog laserdiscs became commercially available in 1978, but production declined rapidly after 1998 because of the success of the DVD digital format. The code "g" should no longer be used for DVDs.

"Cataloging Electronic Resources: OCLC-MARC Coding Guidelines" Revised

In conjunction with the 2002 December 1 implementation of new practices for cataloging integrating resources, OCLC's "Cataloging Electronic Resources: OCLC-MARC Coding Guidelines" (<http://www.oclc.org/connexion/documentation/type.htm>) has been revised.

OCLC Connexion (Chris Grabenstatter, Jim Simms, and David Whitehair)

Maintenance and Enhancements: We continue monthly maintenance and quarterly enhancement installs to OCLC Connexion. A summary of the changes since the last update follows. Details may be found in the monthly install messages, Connexion News, the OCLC Connexion Enhancements page <http://www.oclc.org/connexion/enhancements/>, and the November Enhancement Memo

- September 2002: Labels for CatExpress, WebDewey/Abridged WebDewey Quarterly Update.
- October 2002: Resource Catalog, Cataloging Save File, and Cataloging Constant Data File moved to Oracle.
- November 2002: Choosing Tab Changes Screen Display; New Logon Screen with Related Links; Quick Tips; Cataloging Search Results Brief List Display expanded; Hot Link to Record on Record Number; Jump Bar Improvements; Edit/Action/View Lists changes; Select and Apply Constant Data on the Fly; Authorities Search Results sort order options; Dewey-Only Session Timer Extended to 120 Minutes; Automatic Logon From Dewey-Only Session to Cataloging (and vice-versa); Pathfinders database moved to Oracle.
- December 2002: WebDewey/Abridged WebDewey Quarterly Update.

The February 2003 quarterly enhancement install will include: Record Display changes and options, including new record ID area and option to display fixed fields and status areas at either top or bottom of record; Diacritics entry and display changes, with diacritics entered AFTER characters; Constant Data enhancements, including changing “current” constant data to “default” constant data and addition of “My Status” for CD; Authority Controlling improvements, with more automated matching of headings, especially when an exact match is not found; Preferences terminology updates and enhancements. For more information about these enhancements, as well as other planned changes, see “What’s Next” on the OCLC Connexion Enhancements web page <http://www.oclc.org/connexion/enhancements/upcoming.shtm> and the forthcoming February Enhancement Memorandum.

Passport End of Support and Life: December 31, 2002, OCLC ended support for Passport for Cataloging, with end-of-life to follow next December 31, 2003. Passport users are encouraged to begin planning to move either to Connexion or to CatME by December 2003. To compare Passport and CatME functionality with Connexion features, see the features spreadsheet at <http://www.oclc.org/prod/cataloging/features.xls>.

Browser Support: OCLC Connexion ended support for Netscape 4.x and 6.01 on January 19, 2003. Please see the System Requirements link on the Connexion logon page for additional information about browser support: http://connexion.oclc.org/html/corc/help/en/gs_login_sysreq_hardware_software.html.

Windows Client: Development is underway on the Microsoft Windows client for OCLC Connexion, which OCLC expects to release during 2nd quarter 2003. The first release of the client will focus on online interactive cataloging, macros, and labels. The second release, which OCLC expects to release 3rd quarter 2003, will include NACO support and functionality to catalog electronic resources. The third release, which OCLC expects to release by the end of 2003, will include offline cataloging functionality including a local file and batch processing.

Tutorial: “Using OCLC Connexion Browser: An OCLC Tutorial,” originally released in late October 2002, was **REVISED** in December to incorporate November 2002 enhancements. All modules have been revised except the final one on Managing Constant Data. This module will be revised following the constant data enhancements planned for February 2003.

Diacritics in OCLC Connexion: Beginning 2003 February 16, OCLC Connexion browser users will enter diacritics *following* the character they modify instead of preceding the character. This change will conform to Unicode standards and bring OCLC’s handling of diacritics more in line with worldwide practice. You will continue to have the option to enter diacritics using bar syntax, copy and paste, or a Unicode-enabled keyboard as you do now. Display of bar syntax when in edit view will be optional. You will be able to select the option to display bar syntax under Admin Options in Connexion. If you access Connexion via Internet Explorer, you will be able to enter diacritics by selecting the characters from a pop-up dialog box. This will be very similar to the character selection box currently used in Passport and CatME. Important points to remember:

- A pop-up box for easy diacritics entry will be available for Internet Explorer users.
- When using Connexion, you will enter the diacritic *following* the character.
- ***There will be no change to the entry of diacritics in Passport or CatME.***

No changes will be required for record export; records will be exported in the same format as they currently are.

OCLC CatME for Windows (Anna Sylvester, David Whitehair)

OCLC ended support for older versions of CatME for Windows on October 31, 2002. OCLC currently supports CatME 2.10 (English) and CatME 2.11 (Spanish). Both are available on the OCLC Access Suite compact disc. At some point in the future, CatME will be discontinued. However, the end of life for CatME will not be determined until all CatME functionality has been added to OCLC Connexion.

Windows 98 and NT Support to End June 30, 2003 (Anna Sylvester)

OCLC will discontinue support for Windows 98 and NT 4.0 on June 30, 2003, at the time that Microsoft discontinues support. OCLC expects that applications will continue to work; however, no testing will be completed and no support will be offered for Windows 98 and NT 4.0 after this date. The OCLC Access Suite Applications System Requirements document on the OCLC Web site at <http://www.oclc.org/oclc/menu/suite/systemrequirements.htm> has been updated to reflect this change.

QC (Quality Control) (Brenda Block)

For the first half of the fiscal year ending December 31, 2002, the Quality Control Section received a total of 28,649 requests to change bibliographic records. This total also includes duplicate error reports. QC staff have manually merged 6,802 sets of duplicate records and have made changes and/or corrections to 4,894,696 bibliographic records in the WorldCat database, manually, or, via macros, as well as corrected a total of 1,937,564 records via automated scans. In the past 18 months, more than 400,000 invalid LC class numbers have been modified or deleted. While there are still pockets of problems, users can rely more on the accuracy of the structure of LC class numbers they find in WorldCat. We have also begun looking at ways to identify and modify records for fiction that are coded as non-fiction and will be modifying tens of thousands of records in the next few months. We completed a project to update the obsolete second indicator value blank to zero in field 053 in name authority records. Over 100,000 records were changed and contributed to the Library of Congress.

QC (Quality Control): Database Enrichment (Rich Greene)

OCLC implemented enhancements to Database Enrichment functionality on 2002 September 22. The enhancements add additional fields to the list of fields that any cataloging user may add to a bibliographic record; expands the list of fields that any user may modify in an existing bibliographic record; and allows any user to add local subject headings (with a second indicator value of '4') to any cataloging record. The only restriction to these enhancements is that authenticated CONSER records cannot be modified.

PromptCat (Robin Buser)

The following changes and fixes have been made to PromptCat since the last update:

- Twice-a-day label processing -- PromptCat's processing runs overnight, delivering the records, labels, and reports around 11 p.m. We've added a second daily process in late afternoon that delivers labels only. This allows vendors who print and affix spine labels for PromptCat materials to get those materials processed and to the libraries faster.
- Field indicators for moved call numbers -- PromptCat was deleting the indicators in 9XX fields when it moved a call number. This problem was fixed.
- "No Site ID found" added to Cataloging Report -- A line has been added to the Grand Summary of the Cataloging Report to account for titles that did not have a Site ID in the manifest. In the past, this situation caused blank Cataloging Reports.

We are currently working on a project that will improve match and delivery rates. The project includes:

- Adding Ingram records to WorldCat -- Ingram's records are of high quality. This project will not only benefit PromptCat by allowing more records to be delivered, but it will also increase the number of records in WorldCat for the newest materials, particularly AV materials.
- Adding a DLC match -- Currently, the matching programs that PromptCat uses do not look at cataloging source,

but only at how closely a vendor record matches, field by field, to a WorldCat record. We are going to make a change to PromptCat manifest processing so that when the match is to a non-DLC record, PromptCat will search WorldCat again, based on the ISBN in the manifest, to find a DLC match, if one exists. This will improve the quality of the records that PromptCat delivers, and will allow PromptCat to deliver more records to those libraries that only want DLC records.

- “Y” on Dewey non-fiction -- PromptCat will have the ability to add a prefix of “Y” to the beginning of a Dewey classification number for titles that are sent on a Site ID that has been profiled to get “Y”s.

PromptCat participation has increased to 206 active libraries, with 52 libraries using PromptCat with more than one vendor. In the past four months, PromptCat has delivered 246, 718 records.

PromptCat: New Vendor (Beth Fogler)

In September 2002, BUSCA, Inc. became the 18th OCLC PromptCat vendor partner. Established in 1997 and based in Ithaca, New York, BUSCA is an international distributor, an importer and an exporter. The company supplies both mainstream and alternative titles, out-of-print and obscure monographs. (BUSCA means “search” in several languages.) In addition to monographs, BUSCA offers journals, all AV formats and software. For more information about BUSCA’s services, you may visit the company’s website at: <http://www.buscainc.com>.

Reference Services

Availability of Union List Data from Serials Records in WorldCat on FirstSearch

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 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. Though the OCLC Union List service is updated in real time, the holdings visible from WorldCat on FirstSearch will be updated every 24 to 72 hours. They will be much more up-to-date than the FirstSearch Union Lists database, which is updated twice annually. The default setting for the display of union list data in the administrative module will be on. 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.

Link to Other FirstSearch Databases from WorldCat Detailed Records

WorldCat detailed records include new links to related information in the following FirstSearch databases: Books In Print, Book Review Digest, CINAHL, PAIS International, PapersFirst, and PsycINFO_1887. Other FirstSearch databases will be linked to WorldCat in this way in the future. These links appear in an area labeled “More About This In” that follows the “More Like This” area in the detailed record display. The library must provide access to both WorldCat and the linked database, but no further action is required to activate these links, and they cannot be turned off.

New OCLC FirstSearch Electronic Collections Online Journals

Nineteen new journals from nine publishers, including new publishers The Idea Group Inc. and The Agricultural Institute of Canada, have been added to OCLC FirstSearch Electronic Collections Online, bringing the online total to 4,375 journals available. The new titles and their ISSNs are available at <http://www2.oclc.org/oclc/fseco/index.asp>.

MLA Names File in MLA International Bibliography Thesaurus

Users of the MLA (Modern Language Association) International Bibliography database thesaurus can now search the MLA Names File. As in other FirstSearch thesauri and subject heading files, users access the MLA Names File in the MLA thesaurus by clicking the Subjects icon on the basic, advanced, or expert search screen, then typing in a word, name or concept. The MLA Thesaurus supplies preferred term(s) for the search concept, along with broader and narrower terms, that may be expanded. Additional classification information for names, such as national literature and language, is also provided. Clicking a hotlinked term automatically launches a search.

Search Term Suggestions Available in All FirstSearch Databases

Typos or misspellings in search terms are a major cause of online search failure. A new feature now available in all FirstSearch

databases offers search term suggestions when a search retrieves zero records, similar to what users see in Amazon.com or Google. The search term suggestions increase the likelihood that the user will get results. Suggested terms come from WorldCat and applicable indexes in the database being searched, and hover text (visible in Internet Explorer version 4.0 and above and in Netscape 6.0 and above) indicates the number of records matching terms in the current database. For zero-hit searches, when a term within the search is identified as having zero postings or low postings (e.g., 5 or fewer postings) in a keyword, author, title, or subject index, words that are “close” are suggested as possible replacements. When the user accepts the suggestion and clicks the Search button, it counts as a new search.

Related Entries Expanded to Include Reference Resources from the World Almanacs Database

FirstSearch users can now view information from encyclopedia entries and other reference sources from the World Almanacs database via the Find Related option at the top of the results list. After users finish a search in any FirstSearch database, they can click on the Reference Resources tab to view articles on related topics in the Funk and Wagnalls New Encyclopedia and other resources included in the World Almanacs database. Reference Resources replaces the Encyclopedia Entries tab, which previously pulled from the World Book Encyclopedia database that has been discontinued on FirstSearch. The option to view related results (such as citations in WorldCat, ArticleFirst, Electronic Collections Online and WilsonSelectPlus) displays only to those libraries that have subscription or per-search access turned on for these databases. The option to view related searches is turned on by default in the Interface Display section of the FirstSearch administrative module.

Patron Authentication Through NCIP

OCLC FirstSearch now allows libraries to authenticate users against their existing patron circulation files using the NISO Circulation Interchange Protocol (NCIP). There is no need for libraries to maintain additional patron files to use NCIP. This feature can be set up in the FirstSearch administrative module when a library has a local system capable of communicating using the NCIP protocol. NOTE: Though OCLC is not aware of any local systems that have implemented this capability yet, vendors are likely to adopt the NCIP protocol in the near future, especially if they hear from the library community that they want to buy systems that can use it. NCIP will let remote library users access FirstSearch more easily by using their library barcode or other unique patron number designated by their affiliated library. The NCIP patron authentication feature does not replace any existing authentication methods for FirstSearch (manual logon, IP address recognition, scripted access, IP referer and Athens authentication), but provides an additional method of authentication to a library's FirstSearch account. This is the first feature OCLC has developed based on NCIP, and OCLC will continue to work with NCIP to meet the needs of users.

Resource Sharing, Shelf-Ready, and Contract Services

ILL Policies Directory

The OCLC Library Policies and Technology Directory will be released winter/spring 2003 and will replace the Name-Address Directory (NAD) for ILL policy information later this year. The directory is a completely new, web-based system that will allow libraries to provide detailed information about their hours, collections, holiday schedules, contacts, loan period and charges and, in the future, information about technical implementations (e.g. Z39.50). Users will continue to have summary information but will also have the ability to share much more detailed information about their policies.

Union Listing

Effective November 2002 all lending requests include a copy of the library's serials holdings information to help libraries process requests more quickly. In an upcoming enhancement scheduled for January/February 2003 WorldCat records in FirstSearch will display serials holdings statements for all holding libraries. This is an optional feature, if your library does not contribute serials holdings statements (Local Data Records/LDRs) your symbol will still display for titles you have cataloged. Participating in union listing is much easier than before. OCLC no longer requires MARC Holdings Format compliant data for batch loading via the LDR Updating option—if your data is in electronic format and is in predictable patterns (such as labeled or delimited fields, fixed field length) it's probable that we will be able use your data to load and update serials holdings information in WorldCat.

Batch Processing (Joanne Gullo)

OCLC has updated the OCLC website to include a section describing Batch Processing This can be found at <http://www.oclc.org/batchprocessing/>. In addition, the “Concise Batch Processing Guide” has been issued (

<http://www2.oclc.org/batchprocessing/documentation/concisebatch/concisebatch.pdf>.)

Metadata Capture (Marianne Kozsely)

Batchload Redesign (Phase 2 of the Metadata Capture project) continues in the design and prototyping phases. This phase of the project will contain three GUI interfaces: Batch Services (BS) GUI, Process GUI, and the System GUI. The Batch Services GUI, the interface that will allow Database Specialists to create test set ups for their projects, is being tested by Batch Services. The Process Control GUI is the interface used to monitor the Batch Process Control System, view and control orders, control processes, produce reports, etc. The System GUI allows the system manager to view all system activities. All three GUIs have been prototyped and are being actively tested by OCLC staff. It is anticipated Batchload Redesign will be completed Summer 2003. Preliminary work on the creation of new Matching Algorithms (Phase 3 or the Metadata Capture effort) has begun. This effort requires close coordination with XWC (Extended WorldCat) searching and matching.

Language Sets (Lydia Kegler)

The Language Sets Web Store opened for business on 2002 October 21. The goal of this new order option is to deliver a convenient, secure, easy-to-navigate ordering mechanism that can speed ordering, reduce order errors and simplify repeat order processing. The Web store incorporates many of the conveniences of popular online stores—including secure logon, credit card processing, persistent customer profiles, confirmation that an order has been received (on-screen and e-mail) and links to additional information. To visit, follow the link at <http://www.oclc.org/languagesets/>.

OCLC MARC Record Service (MARS) (Lydia Kegler)

Automated updating and correcting of form/genre headings is now available from OCLC MARS. Libraries can now have obsolete form/genre headings updated to the latest forms used in *Guidelines on Subject Access to Individual Works of Fiction, Drama, Etc.*, Second Edition, 2000. MARS also now provides authority control for the list of genre terms authorized by the National Library of Medicine (NLM) for use in 655 fields.

WorldCat Collection Sets (Susan Walker)

netLibrary CliffsNotes Classic Literature, Modern Literature, and General Reference record sets are now available through OCLC WorldCat Collection Sets. Most netLibrary records in other sets were generated from the LC print version records. However, in many cases the LC print version record was not available for the CliffsNotes titles; these records were generated from print version records cataloged by various member libraries. The records are included in the netLibrary Content Support Service fee. Orders for netLibrary sets will be billed only if users select any options beyond 856 field processing and the required 049 code. As always, we are seeking cataloging volunteers for microform and electronic sets. Our set catalogers are given a special symbol to use only for cataloging the set. Using this symbol, set catalogers search free of charge and get regular cataloging credits. We create the set by collecting all cataloging done using the special symbol. For a listing of available sets and additional information about Collection Sets please see http://www.stats.oclc.org/wcs_list.html.

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