

Institution Records

OCLC implemented access to Institution Records (IRs) in May. Connexion Browser support for IRs will be installed first, followed by support in the Connexion Client later this summer.

Bibliographic Institution Records (IRs) in WorldCat are the result of incorporating bibliographic “cluster” records from the RLG Union Catalog into WorldCat during the integration of RLG into OCLC. These records contain additional cataloging data, such as local call numbers, holdings locations within the institution, or local or copy-specific notes. WorldCat continues with the master record concept, but is adding the ability to link copies of an institution’s version of their record to the master record. *Only authorized libraries* can create and maintain their own institution records linked to the master record. Many existing IRs contributed by migrating RLG libraries who request the process are being loaded into WorldCat as part of integrating the RLG Union Catalog. Institution records (IRs) are assigned OCLC numbers. The OCLC number of the master record to which the IR is linked is system supplied in the 079 field of the IR. All OCLC cataloging authorizations will be able to display IRs that are attached to master records.

Only authorized libraries will be able to create and maintain institution records. This functionality is currently available as an option only to migrating RLG libraries. In the future, all OCLC cataloging members (i.e., non-RLG migrating libraries) will be able to opt to add institution record creation and maintenance functionality to their authorizations, but this will necessitate additional fees that will be added to their current cataloging subscription.

As an option, unique information in institution records will be indexed and available for searching along with WorldCat indexes. You will be able to search WorldCat to include both master record data and unique data in IRs. Unique data in IRs is indexed using all existing bibliographic record indexes, as well as four new indexes: Action Note, General Call Number, IR Control Number, and System Control Number.

An indication of linked IRs for an institution as well as other libraries will be displayed on master records. WorldCat search brief lists will provide an indication of the existence of IRs linked to master records.

A cataloging authorization with IR capabilities can:

- Add new institution records to existing master records.
- Add IRs at the same time you add a new master record.
- Edit and replace existing IRs.
- Delete IRs.
- Move IRs to a different master record.

All OCLC cataloging authorizations will be able to display IRs, export IRs or derive new master or constant data records from them.

OCLC Connexion Browser and Client Functionality and Institution Records

OCLC is adding Connexion Browser and Client functionality to support Institution Records. Connexion browser support for institution records was installed on May 20th, 2007. Connexion access to institution record indexing will be available June 17, 2007. Connexion Client functionality is planned for late June 2007, as part of the Client version 2.00.

OCLC Connexion Browser

The following changes impact users of the Connexion browser:

Searching and viewing IRs:

Two new institution record options will have been added to the Search WorldCat screen:

Select the **Show Institution Record if Single Record Found** to display your library’s institution record(s) when a single master record is found.

Instead of a checkbox to indicate *Show Local Holdings if Single Record Found*, a drop down menu has been added that allows users to choose one of three options when a single record is found:

- Show Bibliographic record
- Show Local holdings record
- Show Institution record

Users may opt to include IR indexes in their searches by selecting “WorldCat and IR” from the “Include Indexes” drop down menu, however please note that even though users will be able to select this option now, the IR indexes will not be available for searching until June 2007.

An indication of linked IRs your institution has created as well as IRs that other libraries may have created is shown on master records. For example the following statement in the record title bar: “ZMY Holdings/IR/LHR - 37 other holdings; 34 other IRs,” indicates that OCLC symbol ZMY has contributed IR record(s) for this master record and also has local holding record(s) (LHRs) attached. In addition, 34 more IRs contributed by other libraries are attached and there are 37 additional holdings on the master record.

You can view IRs linked to the displayed WorldCat record by selecting View/Display Institution Records; then choose to display all institution records or limit your display by specific symbol.

WorldCat brief list search results will provide an indication of the existence of IRs linked to the master record. If your library has IRs attached, in the left column there will be a link to the IR.

Clicking on the IR link takes you directly to your library’s IR(s).

Clicking on the Other IRs link, takes you to all IRs linked to that master record.

Similarly, truncated lists provide an indication in the left column if your library has IRs attached.

Creating and Editing IRs:

- Only authorized libraries will be able to create and edit IRs.
- There is not a workform available for IRs. Authorized users can derive new IRs from master records as well as other library's institution records. This action is available from the **Edit** menu.
- Controlling of headings is not supported for institution records.
- Institution records cannot be saved to the online save file.

For more information about Institution Records, contact Lauren Pinsley (pinsleyl@nylink.org), Lynne Graziadei (graziadeil@nylink.org) or Mary Edgerton (edgertonm@nylink.org) at Nylink.

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Local Holdings Maintenance Users: Note New Browser Functionality to Support Institution Records

If you participate in Local Holdings Maintenance on OCLC to maintain local serials holdings information, you will see some changes in the OCLC Connexion Browser interface upon OCLC's implementation of Institution Records.

For more information on IRs, see the above article "Institution Records."

Primarily, there is a change in the Search WorldCat screen. Previously, Browser users saw a checkbox to indicate *Show Local Holdings if Single Record Found*. A drop down menu replaces the "check box" and users now choose from three options: SHOW Bibliographic record/local holdings/institution record if single record is found.

Selecting the option "Show local holdings if single record is found" from this new menu is the same as checking the checkbox to indicate *Show Local Holdings if Single Record Found* before the new functionality was installed.

See above article for additional Browser functionality changes resulting from the Institution Record implementation.

For more information about Local Holdings Maintenance on the Connexion Browser contact Mary Edgerton at Nylink.

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OCLC WorldCat Collection Analysis: Latest Quarterly Update and Additional Language Limits

The latest quarterly update for Worldcat Collection Analysis has been completed. Data in WCA will reflect changes made to holdings in WorldCat as of March 25th, 2007.

In this recent update OCLC increased the number of languages you can limit your analyses by from 30 to 54. The 24 new languages are:

Afrikaans	Croatian	Panjabi	Tamil
Albanian	Finnish	Sanskrit	Telugu
Armenian	Gujarati	Serbian	Tibetan
Bengali	Macedonian	Slovak	Urdu
Bosnian	Malay	Slovenian	Vietnamese
Catalan	Marathi	Tagalog	Yiddish

NOTE: The number of languages you can limit an analysis by on the Limit Analysis screen is determined by the number of languages represented in the collection you are analyzing. If the collection you are analyzing does not contain *any* records of a particular language, you will not have the option to limit your analysis to that language on the Limit Analysis screen. This is to avoid searches that will return **0** results.

For more information about World Cat Collection Analysis, contact Lauren Pinsley (pinsleyl@nylink.org) or Jennifer Hawkes (hawkesj@nylink.org) at Nylink. You may also wish to visit <<http://www.oclc.org/collectionanalysis>>.

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WorldCat Collection Analysis: New in April 2007

The following enhancements were added to WorldCat Collection Analysis (WCA) on April 15, 2007.

Libraries can now:

- Analyze their ILL activity by Request Date with Request Frequency. Users can add Request Date as a row expansion or limit Request Frequency by Request Date when analyzing ILL activity.
- Export additional bibliographic data, such as Genre, Price, and Series Statement. These additional data fields will be automatically included in exports.

For more information about World Cat Collection Analysis, contact Lauren Pinsley (pinsleyl@nylink.org) or Jennifer Hawkes (hawkesj@nylink.org) at Nylink. You may also wish to visit <<http://www.oclc.org/collectionanalysis>>.

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