

---

---

# Status Line

---

---

## Table of Contents

March 2004

---

### GENERAL INFORMATION

3-4

#### Info Bits

NY3Rs Continuing Education Calendar .....	3
Basic Serials Cataloging Workshop .....	3
Calendar of Events .....	3
Nylink Staff.....	3
Upcoming Nylink Training Calendar for April .....	4

---

### COLLECTIONS AND TECHNICAL SERVICES

5-8

Connexion Browser February 2004 Enhancements .....	5
Nylink Member One of Three Winning Entries in the DDC 21 Contest .....	8
Connexion Client Macro Lessons Now Available .....	8

---

### DIGITAL COLLECTIONS AND PRESERVATION SERVICES

9

New CONTENTdm Version 3.6 Released on February 18, 2004 .....	9
---	---

---

### INFORMATION TECHNOLOGY

11

Spyware in the Library .....	11
------------------------------	----

---

### REFERENCE SERVICES

13-18

#### OCLC FirstSearch News

FirstSearch Content (Databases and E-Journals) .....	13
FirstSearch Functionality.....	13

#### OCLC QuestionPoint News

QuestionPoint Enhancements .....	14
----------------------------------	----

#### Cooperative Services News

Coop News for March 2004 .....	16
Noticed on the Net .....	17

---

---

**RESOURCE SHARING****19-20**Interlibrary Loan Topics

Integration of OCLC ILL and FirstSearch .....	19
New Capabilities Available in FirstSearch (ILL) Staff View .....	19
OCLC-Sharing-L: New OCLC Resource Sharing Listserv .....	19
Announcing ILLiad Version 6.3 .....	20
ILLiad Training is Coming to Albany .....	20

Editors: Meredith Case / Kathleen Gundrum  
Nylink  
State University of New York  
State University Plaza  
Albany, New York 12246  
(518) 443-5444 / (800) 342-3353 / FAX (518) 432-4346  
INTERNET: NYLINK@NYLINK.SUNY.EDU

<http://nylink.suny.edu>

# GENERAL INFORMATION

## INFO BITS

### NY3RS CONTINUING EDUCATION CALENDAR

Visit < <http://www.ny3rs.org/conted.html> > to view the New York Library Continuing Education Calendar created by the New York Three R's Organization. This new tool for professional development contains several statewide training and conference opportunities, as well as some national events.

### BASIC SERIALS CATALOGING WORKSHOP

Nylink is sponsoring a two-day course that provides the basic principles of serials cataloging for original and copy cataloging of print and electronic serials on June 9th and 10th at the Queens Borough Public Library.

The course focuses on the elements contained in the CONSER core record, including appropriate MARC 21 tagging, as well as problem-solving and decision-making relative to serials cataloging. All materials are based on the *CONSER Editing Guide* and *CONSER Cataloging Manual*. This course was developed by the Serials Cataloging Cooperative Training Program and is a two day workshop led by Maggie Horn (State University of New York) and Everett Allgood (New York University). More details about this course can be found on the Nylink web site at < <http://nylink.suny.edu/conser04.htm> >.

#### CALENDAR OF EVENTS

##### **Challenging Changes for Libraries**

Presenter: Marshall Keys  
Rochester Public Library • April 26, 2004

##### **Challenging Changes for Libraries**

Presenter: Marshall Keys  
Hofstra University • April 28, 2004

##### **Challenging Changes for Libraries**

Presenter: Marshall Keys  
William K. Sanford Town Library (Colonie)  
April 29, 2004

##### **Nylink Annual Meeting**

The Gideon Putnam Hotel  
Saratoga Springs, New York • May 3-4, 2004

##### **OCLC ILLiad Training**

Nylink Offices, Albany, New York  
May 11, 12, 13, 2004

##### **Nylink Closed**

Memorial Day • May 31, 2004

##### **Basic Serials Cataloging Workshop**

Queens Borough Public Library • June 9-10, 2004

##### **Nylink Information Showcase**

New York City • November 9, 2004

Visit our web site < <http://nylink.suny.edu> >  
for current information.

#### NYLINK STAFF

Email @[nylink.suny.edu](mailto:nylink.suny.edu)

Ellen Barnum	barnume
Meredith Case	casem
Donna Dixon	dixond
Laura Dolan	dolanl
Sheri Duncan	duncans
Mary Edgerton	edgertonm
Kathleen Gundrum	gundrumk
Ann Gunning	gunninga
Lynne Graziadei	graziadeil
Larry Levine	levinel
Mary-Alice Lynch	lynchma
Jane Neale	nealej
Carrie Nyc	nycc
Margaret Palmiere	palmierep
Jon Penn	pennj
Lauren Pinsley	pinsleyl
Joyce Rambo	ramboj
Tatiana Sahn	sahmt
Deborah Schmidle	schmidled
Anne Siddall	siddalla
Heather Soroka	sorokah
Nancy Steele	steelen
Jennifer Stelling	stellingj
Karen Taaffe	taaffek

## UPCOMING NYLINK TRAINING CALENDAR FOR APRIL

Visit our web site < <http://nylink.suny.edu> > for up-to-date information, course descriptions, directions and online registration. Classes are scheduled through June 2004.

<b>Date</b>	<b>Class</b>	<b>Location</b>	<b>Time</b>
April 14	OCLC QuestionPoint: An Introduction (demo)	Syracuse	10-12pm
April 14	OCLC QuestionPoint Essentials	Rochester	10-4pm
April 14	Introducing OCLC Digital Collections & Preservation Services (demo)	Syracuse	1-3pm
April 15	OCLC QuestionPoint Enhanced Communications & Administration	Rochester	10-4pm
April 16	Strategic Marketing for Academic and Research Libraries	Buffalo	9:30-4pm
April 20	OCLC QuestionPoint: An Introduction (demo)	Rochester	10-12pm
April 20	Cataloging With the OCLC Connexion Browser	Syracuse	10-4pm
April 20	Introducing OCLC Digital Collections & Preservation Services (demo)	Rochester	1-3pm
April 21	Cataloging Sound Recordings	Rochester	10-4pm
April 21	Introduction to XML	Queens	10-4pm
April 21	OCLC QuestionPoint Essentials	Long Island	10-4pm
April 22	OCLC QuestionPoint: An Introduction (demo)	online webinar	10-12pm
April 22	Cataloging With the OCLC Connexion Client	Rochester	10-3pm
April 22	OCLC QuestionPoint Enhanced Communications & Administration	Long Island	10-4pm
April 22	Maximize Your Reference Investment in OCLC FirstSearch	Highland	1-3pm
April 22	OCLC FirstSearch: Advanced & Expert Searching	Highland	9am-12pm
April 23	Strategic Marketing for Academic and Research Libraries	Syracuse	9:30-4pm
April 27	OCLC ILL Direct Request: Letting the Patron(and the OCLC ILL System) Do More of the Work	Queens	1-4pm
April 28	Cataloging Web Sites	Buffalo	10-3pm
April 28	OCLC ILL Basics Using the Web Interface	NYC	10-4pm
April 28	Open Source Software in the Library	Albany	1-4pm
April 29	OCLC QuestionPoint: An Introduction (demo)	Hempstead	2-4pm
April 29	Cataloging With the OCLC Connexion Client	Buffalo	10-3pm
April 29	Linux and Libraries	Albany	10-4pm
April 30	Cataloging With the OCLC Connexion Browser	Buffalo	10-3pm

# COLLECTIONS AND TECHNICAL SERVICES

## CONNEXION BROWSER FEBRUARY 2004 ENHANCEMENTS

The February 2004 Connexion browser enhancements include new and revised features.

### **Editing Enhancements**

**Changes to the LCCN format for editing and display in bibliographic records:** You now have greater flexibility in how you enter or edit an LCCN in bibliographic records. With this enhancement, you are able to enter a new LCCN or edit an existing LCCN with or without leading or trailing blanks in the prefix, with or without a hyphen between the year and serial number, and with or without the trailing blank at the end of a pre-2001 LCCN.

After the LCCN is entered or edited and you reformat, validate, or take a final action, Connexion redisplay the LCCN with the correct number of blanks in the prefix and without the hyphen. The correct number of leading zeros is added to the serial number if you entered the LCCN with a hyphen. In addition, Connexion adds a trailing blank after the serial number for pre-2001 LCCNs if one is not present. If Connexion cannot format the LCCN correctly, it redisplay what you enter and you receive a validation error whenever the record is validated. Examples of errors include: too many alphabetic characters in the prefix; embedded blanks in the prefix; too many or too few digits in the serial number; no year preceding the hyphen; and alphabetic or special characters, other than a single hyphen, in the year and serial number.

In addition, the LCCN appears without the hyphen in the Display View as it did previously in the Edit Views.

The changes for entering and editing an LCCN do not affect how the LCCN appears in an exported record. The LCCN in an exported record continues to be formatted according to the MARC structure. In addition, there are no changes to searching, so continue to use a hyphen when searching.

**Merging repeatable fields from Constant Data in bibliographic and authority records:** When you apply constant data, repeatable fields from the constant data record are added to a bibliographic or an authority record after other repeatable fields or repeatable field groups instead of before them. For example, if the bibliographic constant data record contains an 090 field, it will follow the last 09X field in the bibliographic record. If you produce cards, this enhancement helps ensure that the call number you applied from the constant data record appears in the correct position without further editing.

**Enhancements to Derive for MARC bibliographic records and MARC bibliographic constant data records:** With this enhancement, you have more control over the fields that transfer to a derived record for MARC bibliographic records and MARC bibliographic constant data records. It does not apply to Dublin Core records or authority records. For variable fields, you can choose which variable field groups transfer instead of always having the 1XX to 8XX fields transfer. For the fixed field, instead of having all fixed field values transfer except ELvl, DtSt and Dates, you can choose to have all values transfer or no values transfer.

The new option, Derive Record Fields – Fields to Transfer (MARC only) can be found on the Cataloging Options screen in Preferences. The default setting includes the 1XX to 8XX fields. Once you change the settings and click Save My Default, the new setting becomes your new default. The 9XX field group has been added to the list of field groups you can choose to transfer. There are several fields that will never transfer, i.e., all 01X fields and fields 029, 040, 042, 049, 066, 850, 886, 887, 938, 956 and 987. The Reset button for Cataloging Options restores the system defaults in this option, as it does for the other options on the page.

You can decide which fixed field values transfer each time you choose Derive New Record or Derive New Constant Data Record. You receive a prompt: "Transfer fixed field values to new record?" which includes options for Yes, No and Cancel. If you choose Yes, all values transfer with the exception of the OCLC number, Rec Stat, Entered and Replaced. If you choose No, only default values based on the Type in the original record appear in the new record. If you choose Cancel, you return to the original record.

Be sure to edit the newly derived record carefully to ensure that transferred fields and data apply to the item you are cataloging. Be sure to add fields and data that did not transfer, if appropriate.

### **Record Viewing Buttons Default Change (Lock and Display)**

Lock and Display buttons on brief search results lists for bibliographic and authority records are now hidden by default. Only the hyperlinked entry number, which retrieves a record in Edit View, appears when you initially logon to Connexion. This enhancement makes it easier for you to navigate on these lists if you use the keystrokes <Tab> and <Enter> instead of the mouse. In addition, you can still lock a record with Lock Master Record after you open the record.

If you prefer to have the Lock and Display buttons appear on these screens, you can press <Alt> <Y> to display the buttons. This becomes the new default until you press <Alt><Y> to hide the buttons again. All brief search results screens where Lock and Display buttons are appropriate will change each time you press <Alt><Y> in the bibliographic and authorities databases.

The Show/Hide Record Viewing Buttons keystroke appears on the Keystroke Shortcuts list (<Shift><F7>) in the Search and Browse Keystrokes category.

### **Active Records Screen Enhancements**

Several enhancements are being made to the Active Records screen to improve the ability to locate and retrieve active records during work sessions. Highlights include:

- Reducing the number of headings on the Active Records screen.
- Providing a new Locked label to replace the padlock icon.
- Making Active Records the default action when you click the Show button for selected databases.

Any record that remains open in edit mode in the bibliographic, authority, pathfinder and Digital Archives databases triggers a warning at logoff, as does any active Dewey user note. To get to the Active Records screen easily, you can use the shortcut <Ctrl><Shift>9.

**Headings on the Active Records Screen:** Headings on the Active Records screen appear only if there is an active record under that specific category. You no longer see the entire list of headings every time. Following is a list of the categories that may appear on the Active Records screen:

- Bibliographic Records
- Bibliographic Save File
- Bibliographic Constant Data
- Authority Records
- Authority Save File
- Authority Constant Data
- Pathfinders
- Pathfinder Save File
- Pathfinder Constant Data
- Digital Archive
- Digital Archive Save File
- Digital Archive Constant Data
- WebDewey User Notes
- Abridged WebDewey User Notes

When you display the Active Records screen, the cursor is positioned on the first record and that record is highlighted. You can either click on the link or press to view the highlighted record. Also, the order that the records appear on the Active Records screen is changed. The last record that you opened appears at the top of the list for each category.

**Locked Label Replaces Padlock Icon:** The padlock icon that was used to represent a system lock or user-initiated lock has been removed. Records locked by users (using either the Lock Master Record command or the Lock button) display the label Locked after the title or heading and any other corresponding number. This applies to Bibliographic Records, Bibliographic Save File, Authority Records, and Authority Save File. The term Local Edit no longer appears after a title or heading for an unlocked record in edit mode.

**Show/Active Records Now Default:** The default for the Show button for Show Options on the Cataloging and Authorities tabs is now Active Records. For Pathfinders, it is changed to Active Pathfinders. Active Records and Active Pathfinders are moved to the top position in their respective drop-down lists.

### **Cataloging Agent Authorizations Live in Connexion Browser and Client**

Cataloging Agent institutions can now log into the Connexion browser or client with Cataloging Agent authorizations. The Cataloging Agent authorization allows you to do cataloging for other libraries for which you are profiled. The institution symbols for the other libraries are entered in field 951 \$1. The symbols in field 951 \$1 are the institutions for which the update, produce and delete holdings actions are performed in the OCLC system. The symbol in field 049 is ignored.

Cataloging agents using Connexion have the same functionality as full users for cataloging and authorities. Only the Cataloging, Authorities and General tabs in the browser are available to all Cataloging Agents. Cataloging agents whose authorizations are profiled for Dewey will be able to use WebDewey as well.

The Produce and Update, Alternate Produce and Update, Update Holdings and Delete Holdings, all working off of field 951 \$1, and Export actions on WorldCat records are available as they were in Passport. You can also search, display and export records from the OCLC Authority File as you were able to do in Passport.

New functionality available to cataloging agents in Connexion includes the ability to lock and replace WorldCat records and the ability to edit authority records and export the edited versions of the authority records. You are also able to mouse over the institution symbols entered in field 951 \$1 in the browser to see the names of the institutions that have those symbols. This will be included in version 1.10 of the client in March/April 2004.

Cataloging agents are now able to lock and replace WorldCat records using Passport and CatME as well. All other cataloging agent activities in these interfaces will remain the same as before.

### **Authorities Save File Aging Change**

Authorities save file aging changes from 180 to 90 days. This change impacts authority records saved online in Connexion Authorities, as well as Passport and CatME.

### **Authorities Enhancements**

The 5xx cross references in authority records should now all be available and linked to appropriate 1xx headings. Previously, if a 5xx link matched to more than one 4xx or 5xx cross reference, the system displayed the first authority record and it may not have been the matching authority record.

### **Connexion Tips**

OCLC has launched an area where users of the Connexion cataloging system can find valuable tips and helpful information about using this service. To locate the Connection Tips without logging on to Connexion, go to "Connexion Tips" at < <http://www.oclc.org/support/tips/connexion> >. Once you are logged on to Connexion, you can find the Connexion Tips under Useful Links.

### **New Background Color Option**

A new Background Color Option lets you change from the system default white background to a light blue background. Some may find the light blue easier on their eyes when working in Connexion browser. To change your background color, on the General Tab, under Admin Options, go to Preferences, then General Options, and finally Interface Customization Options. The Background Color option is the last option on this screen. As with other options, you can save the setting for the current session or make it your default.

OCLC recommends that you set your browser to not print background colors and images. If your browser is set to print background colors and images, the new background color will appear on printouts.

### **WebDewey/Abridged WebDewey Enhancement**

The Dewey Services keyboard shortcut for search <Alt><l> lets you search WebDewey (and Abridged WebDewey). You can now easily also search your user notes with the new shortcut <Ctrl><Shift><[> for WebDewey users notes and <Ctrl><Shift><]> for Abridged WebDewey user notes. See the complete list of keyboard shortcuts at "What's New With WebDewey" at < <http://www.oclc.org/dewey/updates/enhancements/default.htm> >.

### **End of Connexion Support for Netscape 6.x**

OCLC ended Connexion support for Netscape 6.x on February 22, 2004. Connexion users, including CatExpress and WebDewey users, will no longer be able to log on using Netscape 6.x.

[OCLC - edited]

## NYLINK MEMBER ONE OF THREE WINNING ENTRIES IN THE DDC 21 CONTEST

Capital District Library Council was one of three winners chosen by OCLC in the DDC 21 contest. Dozens of enthusiastic Dewey-philes submitted ideas for repurposing old copies of DDC 21 now that DDC 22 is available. The three top ideas (as judged by an enthusiastic Dewey staff) received a free one-year subscription to WebDewey. To view the winning entry by CDLC and other entries go to: < <http://www.oclc.org/dewey/versions/webdewey/ddc21contest.htm> >.

[OCLC - edited]

## CONNEXION CLIENT MACRO LESSONS NOW AVAILABLE

In the past, Joel Hahn, Niles (Illinois) Public Library District, has provided macro lessons for Passport and CatME on his web site. Joel has now posted a new Connexion client version of his lessons: "OCLC Macro Language for the complete beginner." These 12 lessons provide an excellent overview of macro writing and are highly recommended to everyone who wants to learn more about macros. The lessons are available from the Connexion client documentation page at < <http://www.oclc.org/support/documentation/connexion/client/default.htm> > and directly from Joel's web site at < <http://users.rcn.com/aardy/oml/lessons/index.html> >.

OCLC sponsors and endorses these lessons, and wishes to thank Joel for all of his great work.

[OCLC - edited]

# DIGITAL COLLECTIONS AND PRESERVATION SERVICES

## NEW CONTENTDM VERSION 3.6 RELEASED ON FEBRUARY 18, 2004

On February 18th, OCLC released Version 3.6 CONTENTdm 3.6 to Direct License users. Direct License users are able to download CONTENTdm 3.6 from the Web.

The new release includes a compound object creation wizard that steps users through a streamlined process to build entire documents, enhanced image optimization features for configuring image size and copyright settings, enhanced advanced search functions, a new slide show feature, and much more. For more information on CONTENTdm 3.6, see < <http://www.contentdm.com/news/3point6.html> >.

### **Please Note the Following Date**

February 25th: OCLC began installing CONTENTdm Hosted version 3.6 software on Hosted Production sites and Hosted Evaluation sites. OCLC also sent detailed instructions to these users to help them with the transition.

All of these installations were hot cutovers. Maximum down time for any one instance was about 10 minutes.

After a site is upgraded to CONTENTdm 3.6, users will have to download the 3.6 Acquisition station.

Detailed instructions were mailed to CONTENTdm Direct License users, Hosted Customers, and Evaluators under separate covers.

For more information about Digital Collection and Preservation Services, please contact Nylink's Donna Dixon (dixond@nylink.suny.edu) or Joyce Rambo (ramboj@nylink.suny.edu).

[OCLC - edited by Joyce Rambo, Reference & Digital Collections Librarian, Nylink]



# INFORMATION TECHNOLOGY

## SPYWARE IN THE LIBRARY

SpyWare is software and hardware used on computers to track every action and keystroke of the users. It can capture passwords, credit card numbers and any other information that the user enters at the keyboard.

SpyWare can be used intentionally in libraries to monitor workstation activity for illegal activity but it can also be inadvertently installed on PCs through downloads, e-mails, and web sites. How do you know if your computer has been infested with SpyWare? It may operate more slowly than before, new tool bars may appear in your browser, or new applications may show up in your system tray. However, PC users are often completely unaware of such installs, and as a result, have no idea that their activities are being tracked. The SpyWare in such cases can be used to track user activities and send the information to whatever source is collecting it.

This has potential implications for public and staff use workstations in our libraries. We need to be educated about these types of programs and how they are installed, removed, and most importantly, how their installation can be prevented. We also need to educate our users about the possible tracking of their activities and collection of private information when using library workstations.

To learn more about how SpyWare can impact libraries, visit the following URL for an article: *Uncovering the 'Spy' Network: Is Spyware Watching Your Library Computers?* by Daniel Fidel Ferrer and Mary Mead at < [http://www.infoday.com/cilmag/may03/ferrer\\_mead.shtml](http://www.infoday.com/cilmag/may03/ferrer_mead.shtml) >.

To learn more about SpyWare in general, visit < <http://www.pcworld.com/howto/article/0,aid,111630,pg,1,00.asp> > for the article *Escape the Spyware Nightmare* by Scott Spanbauer.

[Jane C. Neale, Information Technology Coordinator, Nylink]



# REFERENCE SERVICES

## OCLC FIRSTSEARCH NEWS

### FIRSTSEARCH CONTENT (DATABASES AND E-JOURNALS)

#### ***Dissertation Abstracts and WorldCat – OpenURL Linking Enhanced***

OpenURL links now appear in all *WorldCat* records, including sound recordings, visual materials, music scores, Internet sites, computer files, archival records, and maps. Previously, OpenURL links were only available in records for books (including ebooks), articles and journals. Additionally, it is now possible for users in the *Dissertation Abstracts* database on OCLC FirstSearch to link to the full text of a dissertation if libraries have licensed this full text from a partner information service and set up their OpenURL resolvers to be compatible with v1.0 OpenURLs.

#### ***Electronic Collections Online (ECO) – More Journals Added***

Fifty-four new journals from 10 publishers have been added to the OCLC FirstSearch *Electronic Collections Online* database, bringing the online total to 4,857 journals available. The new titles and their ISSN's are available at < <http://www2.oclc.org/oclc/fseco/index.asp> >.

#### ***Link from FirstSearch to the JSTOR Arts & Sciences IV Collection***

Libraries that subscribe to the Arts & Sciences IV collection on *JSTOR* can link from records in FirstSearch databases to full-text articles in *JSTOR*. The Arts & Sciences IV collection covers business, education, law, psychology, and public policy and administration. As with other *JSTOR* collections, libraries can set up this link on the FirstSearch administrative module web site at < <http://firstsearch.oclc.org/admin> >. Click on the "Resource Linking" tab; then on the "Outbound Linking" link; scroll to the *JSTOR* section of the screen to enable outbound links to each *JSTOR* collection to which your institution subscribes. For additional information on *JSTOR* collections, please see < <http://www.jstor.org/about/collection.list.html> >.

### FIRSTSEARCH FUNCTIONALITY

#### ***Korean-Language Added to FirstSearch Interface***

As with the other non-English FirstSearch search interfaces (Spanish; French; Chinese, simplified and traditional, and Japanese) already available in FirstSearch, a link at the bottom of the search screen now allows users to switch to the Korean-language interface in FirstSearch. OCLC hopes to offer a Korean-language FirstSearch administrative module in the future.

#### ***New Capabilities Available In Firstsearch Interlibrary Loan Staff View***

The FirstSearch staff view has been improved, providing interlibrary loan staff with additional information and functionality when requesting items through the FirstSearch interlibrary loan staff view. Interlibrary loan staff can now:

- 1) Speed up their searching as the FirstSearch staff view now automatically defaults to search the *WorldCat* database in FirstSearch.
- 2) Track ILL requests more easily by receiving the request number once the request has been submitted in the FirstSearch staff view.
- 3) Improve workflow by printing the request with a barcode.
- 4) Ensure complete and accurate ILL requests by being prompted for errors before producing the ILL request.
- 5) Improve accuracy of ILL data as information from two additional MARC bibliographic fields (300: Physical Description and 773: Host Item) will now transfer into the Title field of the ILL request.

[OCLC – edited by Joyce Rambo, Reference & Digital Collections Librarian, Nylink]

#### **Contact Information**

For more information about OCLC's FirstSearch service, please contact Nylink's Donna Dixon ([dixond@nylink.suny.edu](mailto:dixond@nylink.suny.edu)) or Joyce Rambo ([ramboj@nylink.suny.edu](mailto:ramboj@nylink.suny.edu)).

## OCLC QUESTIONPOINT NEWS

### QUESTIONPOINT ENHANCEMENTS

Numerous enhancements were added to QuestionPoint on February 15th, 2004. Some of them are described below.

#### **KNOWLEDGE BASE ENHANCEMENTS**

##### **Use a KB Record to Answer a Patron**

A new Search KB button on the Full Question page enables you to quickly search either your local or the global Knowledge Base to see if a record already in the KB will be useful in answering your current patron.

If you find a record you want to use, you can copy it into your current answer box. From there you can edit the answer as needed or submit it as is to the patron. QuestionPoint records the KB record number in the history of the current question/answer. (Note: the link between the two records is broken if you save your answer as a Draft or as a Librarian Note.)

A second option is to just forward the Knowledge Base record from the page on which you retrieved it. Again, you can edit the answer as needed, and also include additional email addresses in the CC: line of the email. The KB record number is recorded in the history.

##### **Show the Number of Times a KB Record Was Reused**

As a Knowledge Base record is re-used (described above), QuestionPoint increases the re-use count by one. The count, which is new with this version, appears in the header information of the KB record.

##### **Facilitate Addition of Web-form Information**

When submitting a question and answer to the Knowledge Base, your workflow may prevent you from easy access to the original question form on which you might have captured information you want to keep with the KB record. For example, your web form may ask for status such as student, faculty, staff, or you might ask the patron for his or her reason for asking the question (school assignment, business research, general curiosity). You can record any of this information in the Keyword field of the KB record.

If you submit, edit, and save the record for activation in one process, you can view web-form information, side by side with the KB record form, by using the Print View button on the Ask Full Question page. Just size the pop-up page as necessary to keep it displayed. This is not new.

If you submit and later edit the record for activation, in two separate processes, you can now also view the original Q&A while editing the record. The Ask Question ID number, in the header information, is hot-linked. When you click on it, a view of the original Q&A pops up in a window you can conveniently size, so you can see it side by side with the record you are editing.

##### **All-librarian Browse**

Now any librarian with permission to at least view the local and global Knowledge Bases can also browse them. This allows access to records that have not yet been activated, so are not yet indexed and accessible via the Search option. Consult online Help for information on browsing a Knowledge Base.

#### **CHANGES IN THE ADMINISTRATION MODULE**

##### **Customization of E-mail Messages**

In a new feature in the Administration module, under Settings/Custom Messages, the Institution Administrator can now customize e-mail messages that go outside the library. These include:

- Patron: Question acknowledgement and new account information
- Patron: Question acknowledgement for returning patrons
- Patron: Request for clarification
- Patron: Answer

- Patron: New account following chat session
- Patron: Transcript of chat session
- Expert: Refer by e-mail

Although all the header information is system controlled, administrators can customize the greeting and closing of e-mail messages, and in some cases, part of the body text as well.

### **Customization of the Acknowledgement Page**

In the same new settings feature (*Administration/Settings/Custom Messages*), the Institution Administrator can customize much of the text that appears on the Acknowledgement page patrons see after submitting a question form.

### **Custom Reply Text**

Currently, administrators can set Custom Reply Text that appears at the bottom of all e-mail messages to the patron and at the bottom of the Acknowledgement page. This feature remains, but has been repositioned behind the new *Custom Messages* tab.

### **Additional Patron Survey Questions**

Administrators have an additional 19 questions to select from, when building a survey for patrons. This brings the total number to 24. The limit of questions per survey has been increased from five to 15.

### **Changes to the Patron Interface**

The interface for which your patrons receive accounts has been modified with this release. Patrons will now see status indications for their questions, showing when a question is New (not yet touched by the library) or Pending (assigned to a librarian, if in the Unanswered folder; requires a response if in the Answered folder). It also shows if a question has been referred to another library. The Full Question page displays the name of the library to which the question was sent. Minor changes in text have been made to clarify how a patron can cancel a question if they need to.

## **CHANGES WITHIN THE ASK MODULE**

### **Refer-by-E-mail Improvements**

The Refer-by-E-mail option (*Ask/Full Question/Refer Question*) has undergone some modifications so that users will not inadvertently send unwanted text to patrons. When the "expert" responds with an answer, you must either *edit* or *delete* the response – you cannot save it as is.

After you edit the response, your next step will be to save the edited text either as a Librarian Note, or as an Answer.

**It is important to note** that if you save the text as the Answer, the text will be sent to the patron at that point.

A caution box will interrupt with a confirmation request.

If you choose to save the entire or edited response as a Librarian Note, the text is saved in the question history, but will not be viewable by the patron. You can later cut and paste the text you want from the Note, to enter into the Answer box for the patron.

See online Help for step-by-step instructions.

### **Reset Clock**

A small hourglass icon appears on the right side of the upper gray bar in your interface. At any time, one click on that icon, and your time-out clock is reset to begin timing again. (See the next section for time-out periods.)

### **Set Time-out Period**

Each librarian can set the time-out period to best suit his or her needs. In the Home module, under the Settings link, look for Session time-out period. Options are 30 minutes, 1 hour, and 2 hours. This setting remains for all sessions under the account number with which you logged in. You can set it to another time period at any time.

### Hide Notes and Tips

Notes and Tips appear in small boxes in the right margin of your interface. They are intended to offer additional useful information about the particular page or the tasks to be performed there. Once you are familiar with QuestionPoint, you can hide the notes and tips to gain additional space. Hiding these aids will especially help users whose browser settings require them to scroll to the right to see the entire QuestionPoint screen.

Notes and Tips default to "display." To hide them, go to *Home/Settings/Notes and Tips* and check the "Hide behind Notes icon" radio button. These aids will now be accessible by clicking on a note icon that appears on the right side of the upper gray bar. It is to the right of the new hourglass icon.

### Search Profiles

All librarians with at least View access to the *Profile* module can search all profiles for libraries in the same group(s) – applies only to subscription and/or Global Reference Network groups. Libraries must be Active in the specified group to be retrieved in a search. If the library of the user who is searching is not active in a particular group, that group will not appear as a search option.

To search:

Go to the *Profile* module and click on the *Search Profiles* tab. On the Search Profile page, click on the box(es) of the "source" group(s) you want to search. This option appears at the bottom of the *Limit to:* section. Complete any other fields, to search by keyword, limit option, and collection strengths, and click on the Search button. Libraries with profiles that match your search criteria are returned in a list. Click on the hot-linked library name to see the library's profile. You receive a "print view" of the profile, rather than an editor's view.

For more information on searching profiles, see the online Help.

### Participant Lists Enhancement

Another way to see libraries' profiles is via the Participant Lists. These are available in the *Home* module, under *Reports, Participant Lists* tab. After selecting the list you want, the names of member libraries appear, hot-linked each to its profile. Click on the link to view the profile. Libraries must self-identify for some of these lists so they may not be comprehensive.

### Chat Transcripts in the Interface

A small but important change to the appearance of chat transcripts in the QuestionPoint interface is that the name the patron entered on the chat form no longer appears as part of the transcript title in the question list. E.g., currently you see "Chat Session Transcript with [library patron]" in the Question field. To ensure patron privacy after Q&As are archived, the name portion of the title has been dropped. All else remains the same.

[OCLC – edited by Jane C. Neale, Information Technology Coordinator, Nylink]

## COOPERATIVE SERVICES NEWS

### COOP NEWS FOR MARCH 2004

#### Nylink netLibrary Third Shared Collection

From March through August 2004, Nylink will be offering its members and other NY libraries the opportunity to participate in the third Nylink shared collection. This collection features new lower pricing for all library types, early commitment discounts, delayed invoicing, and the opportunity for libraries to select titles. Get pricing, a timeline, and a chart showing progress towards our goal of 2000 titles here: < <http://nylink.suny.edu/coop/net3.htm> >.

#### 2004 OUP and Grove Pricing

2004 pricing for all electronic resources from OUP and Grove is now available. For OED, ANB, Oxford Reference Online and Oxford Scholarship Online pricing, please see the Nylink Cooperative Services web site at < [http://nylink.suny.edu/coop/oup\\_price.htm](http://nylink.suny.edu/coop/oup_price.htm) >. For Grove Art and Music pricing (including new lower simultaneous user-based pricing for small public libraries), please see < [http://nylink.suny.edu/coop/Grove\\_pri2.htm](http://nylink.suny.edu/coop/Grove_pri2.htm) >.

### Dictionary of National Biography: Print and Online Bundle

Oxford University Press is printing a new edition of the *Dictionary of National Biography*; Nylink members are eligible for a special print/electronic bundle offer at a special network discount. For \$9000 (List: \$9900), the entire 60 volumes, as well as a free online subscription to DNB Online for the first year only. For additional information on the print and online version, please visit DNB's web site at < <http://www.oup.com/oxforddnb/info/> >, or Nylink's web site at < <http://nylink.suny.edu/coop/dnb.htm> >. Is a 60-volume print work overkill for your library? Electronic-only trials and subscriptions should be available in late summer/ early fall of 2004.

### Emerald: Launches and Acquisitions Suite Offer

Current Emerald Fulltext subscribers are eligible to add the new Launches and Acquisitions Suite at 40% of the list price. The L & A Suite includes the following 18 titles: Aslib Proceedings, The Balance Sheet, Corporate Governance, The Electronic Library, Foresight, Info, Journal of Documentation, Journal of Fashion Marketing and Management, Journal of Small Business and Enterprise Development, Measuring Business Excellence, On the Horizon, Online Information Review, Performance Measurement & Metrics: The International Journal of Library and Information Services, Program: electronic library and information systems, Records Management Journal, Strategy & Leadership, Handbook of Business Strategy, Journal of Business Strategy

For ordering information, subscribers should call the regional Emerald Business Manager Hilary Olson at 1-888-622-0075.

Please see < <http://nylink.suny.edu/coop/emerald.htm> > for the latest information on Nylink's Emerald Fulltext offer.

### Price Increase for Harrison's Online

For several years, Nylink has had a terrific per SU price for Harrison's Online that has stayed very low even as that resource has grown and developed. We will not be able to continue to offer that price next year.

Pricing for Harrison's Online will increase for the November 1 2004-October 31 2005 subscription year (next cycle) to \$645 per simultaneous user. We very much regret that we're not able to scale the price increase better for our current subscribers, but are excited that we are now able to also offer AccessMedicine and a broad collection of other medical and health science resources that will integrate with Harrison's Online. The price increase does not include AccessMedicine. We welcome your feedback about this change. See < [http://nylink.suny.edu/coop/mcg\\_harr.htm](http://nylink.suny.edu/coop/mcg_harr.htm) > for more details.

## NOTICED ON THE NET

March is here at last! We can look forward to the first day of spring and days with temperatures above freezing. To celebrate the warming trend, we offer new and interesting web sites designed to educate, inform and amuse: a new meta search engine for you to try, a legal resource, the annual IRS forms and publications, and a history of social security in the U.S. Hope you find time to check them out.

New search engines continue to evolve. Here is one that is innovative and worth checking out. **Zapmeta** (<http://www.zapmeta.com>) is a new meta-search engine, released in September 2003. They offer meta searching access to Teoma, Wisenut, AOL, Yahoo, MSN, Open Directory, AllTheWeb, HotBot, and Gigablast. Set your own preferences to select a timeout for searching each source, set how many results you want displayed, decide whether you want to group common results from multiple search engines, sorting parameters (relevance, domain, popularity, title or source), turn on the results snapshots and more.

ZapMeta supports basic Boolean expressions and operators, also phrase searching, truncation, proximity indicators, and advanced search fields. Results indicate how many hits were found in each search engine selected. You may link to older versions of the resulting web sites through a link to the WayBackMachine which lists each time a site was updated and the number of pages changed for each update. The QuickView option on the results page will pop the main page of a web site into a window beneath the result link. For many results there is a snapshot of the main page which will take you directly to the site. There is also a human-edited directory if you prefer to browse in a particular area. Enough description – I recommend you take a tour of this new entry; I think you'll like it!

A legal resource of interest is **American Law Sources On-line (ALSO)** (<http://www.lawsource.com/also>). This site provides "...a comprehensive, uniform, and useful compilation of links to freely accessible online sources of law for the United States and Canada." There is also a link for Mexico. The U.S. resources include both federal and state; the federal law section includes Courts of Appeals, District Courts, Special Courts, Congressional Bills, the U.S. Code, Interstate Compacts and more. Under the Federal Government link you may also search and retrieve any U.S. Supreme Court case back to 1790 by citation or by using the text-search function. The text-search information is from a LEXIS database; registration is required, but is free. Additional resources here include the ability to search the Supreme Court order lists (from Cornell Law School, Legal Information Institute); access to a database of the 1,000 cases most cited by the Court itself; or search the Supreme Court opinions (1937-1975) by part name or text search, to name a few. State law is also linked to; using New York for example, check out the NY Constitution, Court Rules, Law Reviews, Bills & Session Laws, Cordified Laws, Local Laws, Legal Forms, and more. In addition, there are links to commentaries and practice aids available without charge or a reasonable charge from government and nonprofit providers. A rich resource for many electronic reference collections.

It's that time of year again. For IRS tax forms and publications, go to **Internal Revenue Service (IRS) – Forms and Publications** (<http://www.irs.ustreas.gov/formspubs>). What can I say? You can find anything necessary for reporting and paying taxes at this site. Categories include: What's Hot in Tax Forms, Pubs, and Other Tax Products; Forms and Instructions; Forms and Publications by Date or Number; Prior Years Forms and Publications (for those who are really late); Extension of Time to File Your Tax Return, and many more. A must for any library's electronic resources.

Since Social Security is in the news nowadays, you may want to visit **The History of Social Security** (<http://www.ssa.gov/history>). This site "...contains one of the largest and most extensive collections of history-related materials in the federal government." It includes the institutional history of the Social Security Administration as well as the history of the Social Security program. The In-Depth Research section includes information on the legislative history of social security; speeches and articles; social security pioneers, a photo gallery and more. There are also links to books of interest and related sites. One item to note is the Quick Intro section with such tidbits as The First Card & the Lowest Number, The SSN Numbering Scheme, Significant Milestones in Social Security Number Policy to name a few. A good time to add this to your resources!

That's it for March. Beware the Ides and come back to see what we have to offer in April. If things are not too taxing, we should have more resources to tempt and intrigue you.

[Nancy Steele, Cooperative Services Manager, Nylink]

# RESOURCE SHARING

## INTERLIBRARY LOAN TOPICS

### INTEGRATION OF OCLC ILL AND FIRSTSEARCH

OCLC ILL is being integrated with FirstSearch. This will allow ILL staff to take advantage of improved searching and many other features currently available in FirstSearch that are not available through traditional OCLC ILL. In addition, OCLC will be introducing many new enhancements to the FirstSearch staff view. OCLC has created an excellent FAQ which explains many of the issues surrounding the integration of OCLC ILL and FirstSearch. This FAQ is located on the OCLC web at: < <http://www.oclc.org/ill/firstsearchfaq/default.htm> >.

As more information about the changes to OCLC Resource Sharing becomes available, Nylink and OCLC will keep you informed via as many communication methods as possible – on the NylinkNews listserv, in *Status Line*, in *Nylink Connection*, on the ILL listserv and on the Nylink and OCLC web sites.

### NEW CAPABILITIES AVAILABLE IN FIRSTSEARCH (ILL) STAFF VIEW

The FirstSearch staff view has been improved, providing interlibrary loan staff with additional information and functionality when entering requests.

When requesting items through the FirstSearch staff view, users can now:

- Speed up their searching as the FirstSearch staff view now automatically defaults to search WorldCat.
- Track ILL requests more easily by receiving the request number once the request has been submitted in the FirstSearch staff view.
- Improve workflow by printing the request with barcode.
- Ensure complete and accurate ILL requests by being prompted for errors before producing the ILL request.
- Improve accuracy of ILL data as information from two additional MARC bibliographic fields (300: Physical Description and 773: Host Item) will now transfer into the Title field of the ILL request.

### OCLC-SHARING-L: NEW OCLC RESOURCE SHARING LISTSERV

Keep abreast of what's happening with OCLC's resource sharing system! OCLC has launched a new, broadcast-only listserv to keep users of OCLC ILL abreast of upcoming enhancements. The list will help you take advantage of new capabilities coming in the next 18 months that can streamline your workflow and help you serve your users better.

Postings to OCLC-SHARING-L will include information about changes to the system, customization tips like those now posted on FirstSearch-L, and announcements of upcoming maintenance.

There are two ways to subscribe to the new listserv:

- Send the following command to [LISTSERV@OCLC.ORG](mailto:LISTSERV@OCLC.ORG): `SUBSCRIBE OCLC-SHARING-L <first name last name>`.

*Or*

- Go to the OCLC web pages: < <https://www3.oclc.org/app/listserv/> > and subscribe to OCLC-SHARING-L.

## ANNOUNCING ILLIAD VERSION 6.3

OCLC ILLiad 6.3 is now available. This release includes the following features:

- Z39.50 searching – OCLC ILLiad now supports Z39.50 searching. As a lender, this allows you to search incoming requests in a standards-based way to import your local call number and shelf location into requests. As a borrower, this allows you to check your patron's requests against your OPAC. In addition, you can configure OCLC ILLiad to search multiple OPACS. Please note that distributed Z39.50 searches are most effective for number-based searches (ISSN, ISBN, OCLC Control Number) and against a limited number of targets. OCLC advises no more than 15 targets for a distributed search (same as FirstSearch local holdings), keeping in mind that each target added will increase the time for a search to complete.
- Improved interaction with RLG ILL Manager - Atlas Systems and RLG have done additional testing to improve ISO ILL interaction.
- Improvements to Electronic Delivery Cleanup
- Improved OCLC ILLiad Connector functionality - The Connector now downloads all OCLC special messages for Borrowing and Lending if those command tags are added to the job. All scheduled jobs for the Connector now have a timeout option that will close a connection that has been open and inactive as well as immediately close and log an error if unable to log in the first place.
- Improved documentation - New help files with flash animation have been added. Animated help allows libraries to review ILLiad's workflow a step-at-a-time. This can be used to help train new staff or review workflow with current staff.

To learn more about ILLiad documentation, go to: < <http://www.atlas-sys.com/documentation.html> >.

- Coming Soon: Billing Manager – In the first quarter of 2004, OCLC ILLiad's billing functions will become a separate module. This allows libraries to have designated staff, such as a finance department, handle billing and payments without having an ILLiad client and without access to all of ILLiad. This also allows libraries to give staff access to ILLiad for borrowing and lending without having access to the billing module. Charges and billing categories are still determined through the Customization Manager and the client, but all invoicing and follow up for late payments will be done through the new Billing Manager. The Billing Manager will also allow staff to create custom reports for any billing information needed.
- Coming Soon: Direct Request interaction – In the first quarter of 2004, Direct Request will be more fully integrated with ILLiad. This will allow libraries to take advantage of all of the efficiencies of Direct Request and all the efficiencies of ILLiad. ILLiad libraries that use FirstSearch will be able to use both Open URL and Direct Request.

Please contact Jon Penn at Nylink with questions or for more information at 518-443-5444/800-342-3353 or [pennj@nylink.suny.edu](mailto:pennj@nylink.suny.edu).

## ILLIAD TRAINING IS COMING TO ALBANY

Atlas Systems, Inc. and Nylink are jointly sponsoring training classes on OCLC ILLiad at the Nylink offices in Albany, New York.

Three classes are being offered. Detailed course outlines are available on the training page at Atlas Systems, Inc. < <http://www.atlas-sys.com> >

- Report Generation in OCLC ILLiad - May 11, cost: \$250
- Implementing OCLC ILLiad - May 12, cost: \$250
- ILLiad Administrator Training - May 13, cost \$450

For additional information, please contact Jon Penn at Nylink ([pennj@nylink.suny.edu](mailto:pennj@nylink.suny.edu)) or Dan Specht at Atlas Systems ([dspecht@atlas-sys.com](mailto:dspecht@atlas-sys.com)), or visit < <http://nylink.suny.edu/RR/atlaslm04.htm> >.