

# Status Line

## Calendar of Events

### Metadata and Digital Library Development

Co-sponsored with ALCTS  
 Mid-Manhattan Library  
 New York City, New York  
 July 26-27, 2007  
 <[http://nylink.org/events/  
 meta\\_dig07.cfm](http://nylink.org/events/meta_dig07.cfm)>

### Nylink Showcase

Holiday Inn  
 Saratoga Springs, New York  
 November 13, 2007  
 <[http://nylink.org/events/  
 showcase07.cfm](http://nylink.org/events/showcase07.cfm)>

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

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## Upcoming Nylink Training Calendar for July-September 2007

Visit our web site <<http://nylink.org>> for up-to-date information, course descriptions, directions and online registration. Classes are currently scheduled through September 2007.

### July

Day	Class	Time	Location
10	Cataloging With the OCLC Connexion Client	10a.m.-3p.m.	Farmingdale
16	Basics of Local Holdings Mainanence	1-2:30p.m.	Webinar
19	Cataloging Electronic Serials	10a.m.-3p.m.	WNYLRC
20	OCLC WorldCat Resource Sharing Basics	10:30a.m.-4:30p.m.	NY Public Library
23	MARC Format for Holdings Data	1-3p.m.	Webinar
25	How to Create and Manage Digital Collections Using CONTENTdm	9:30a.m.-4p.m.	LIU Brooklyn
30	Reinventing Library Spaces	1-2:30p.m.	Webinar

### August

Day	Class	Time	Location
6	Institution Records	1-2:30p.m.	Webinar
13	Protecting your Patrons' Privacy, Patron Data, Audits & Privacy Policies	1-2:30p.m.	Webinar
15	Cataloging with the OCLC Connexion Client	10a.m.-3p.m.	LIU Brooklyn
16	Cataloging Sound Recordings	10:30a.m.-4:30p.m.	NY Public Library
20	OCLC FirstSearch: The Administrative Module	1-2:30p.m.	Webinar
22	Boosting Productivity With the Connexion Client	10a.m.-4p.m.	RRLC
23	Cataloging with the OCLC Connexion Client	10a.m.-3p.m.	CLRC
27	Serving Your Patrons Virtually	1-2:30p.m.	Webinar
28	Custom Holdings	1-2:30p.m.	Webinar

### September

Day	Class	Time	Location
5	Cataloging with the OCLC Connexion Client	10a.m.-3p.m.	Westchester CC
6	Metadata for Digital Collections	10:30a.m.-4:30p.m.	NY Public Library
10	Accounting Fundamentals for Librarians: Understanding Credits, Debits, and Basic Budgeting Principles	4 weeks	Online workshop
10	Bare Bones Photoshop for Digital Projects	1-2:30p.m.	Webinar
17	Marketing User Services-Reference	1-2:30p.m.	Webinar
18	WorldCat Resource Sharing Auto Deflection and the Policies Directory	1-2:30p.m.	Webinar
19	OCLC WorldCat Resource Sharing Basics	10a.m.-4p.m.	Broome County Public Library
24	Exploring XML Part 1	1-2:30p.m.	Webinar
27	Cataloging Web Sites	10:30a.m.-3:30p.m.	NY Public Library
28	Exploring XML Part 2	10-11a.m.	Webinar

## What's Up on the Web?

This month's Web picks were prompted by inquiries conducted by two librarians seeking information about their profession. I thought it worthwhile to pass along their discoveries.

Recently, an academic librarian posted an e-mail to a list to point out to his colleagues the wealth of resources available at the New York State Library web site. In particular, he highlighted the **Librarycareersny.org** site <<http://librarycareersny.org/>> which is just one of the many types of resources accessible via the state library's **Division of Library Development** pages <<http://www.nysl.nysed.gov/libdev/>>. For example, all sorts of interesting facts and statistics can be found, such as a breakdown of the numbers of libraries by type (academic, public, school and special) and by 3Rs library council region <<http://www.nysl.nysed.gov/edocs/education/library/dir/profile.htm>>.

Take a look at **New York's Libraries: How They STACK UP!** at <<http://www.nysl.nysed.gov/libdev/stackup.htm>> for facts compiled and presented for the purpose of showing the value of libraries in New York State. For directory-type information for locating libraries and library systems, go to <<http://www.nysl.nysed.gov/edocs/education/library/dir/index.html>>.

At a conference this spring, a librarian asked about **Dewey Decimal Classification** resources. I pointed her to the OCLC web site at <<http://www.oclc.org/dewey/>> where a great deal of free information about DDC structure and the latest updates is available. There's even a Dewey blog at <<http://ddc.typepad.com/025431/>>. A fun resource is the Dewey screensaver that takes you through the DDC in an entertaining fashion. Perfect for K-12 or public library computers, the screensaver can be downloaded for free from <<http://www.oclc.org/dewey/resources/screensaver/default.htm>>.

[Ann Gunning, Member Services Librarian, Nylink]



## 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.

IOCLC - edited

**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.

IOCLC - edited/Mary Edgerton

**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>>.

IOCLC - edited

**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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**Collections & Technical Services Contact Information**

Please contact Lauren Pinsley (pinsleyl@nylink.org), Lynne Graziadei (graziadeil@nylink.org) or Mary Edgerton (edgertonm@nylink.org) at Nylink with any questions. They are available via email or phone (518-443-5444 / 800-342-3353).

## Web of Correspondence

OUP's *Electronic Enlightenment* is coming soon; the scheduled launch date is September of 2007. *EE* will offer access to the full critical editions of the letters of more than 3,800 writers including Addison, Bentham, Boswell, Defoe, Hobbes, Hume, Kant, Locke, Pope, Rousseau, Smith, Swift, Sterne and Voltaire. Consisting of over 75,000 letters from more than 60 critical editions, *EE* will also have links to the *Dictionary of National Biography* and the *Encyclopedia of the Enlightenment*. More information at <<http://www.oup.com/online/ee/>>, or contact [services@nylink.org](mailto:services@nylink.org).

## OUP Early Adopter Discounts

Do you feel lucky? Take a chance and sign up for any of OUP's upcoming databases before July 1, sight unseen,

*Electronic Enlightenment* (June)

<<http://www.oup.com/online/ee/>>

*Oxford Language Dictionaries Online* (August)

<<http://www.oup.com/online/oldo/>>

*Encyclopedia of Popular Music Online* (September)

<<http://www.oup.com/online/epm/>>

*Oxford Islamic Studies Center* (October)

<<http://www.oup.com/online/islam/>>

... and get an additional 10% off. Nylink can give tentative quotes (pricing is not completely finalized, though any changes are likely to be minimal) for all but the *Oxford Language Dictionaries Online*. Contact [services@nylink.org](mailto:services@nylink.org) for a quote or more information.

## 2007 BioOne Publishers and Partners Meeting Presentations Available for Download at BioOne Web Site

Some very interesting presentations are online at the BioOne website, <<http://www.bioone.org>>. See the BioOne News sidebar for links. Roger Schonfeld, Manager of Research at Ithaka, presented some preliminary findings from a Mellon-funded study on the impact of digitization on citation patterns. Ithaka <<http://www.ithaka.org/>> is an independent not-for-profit organization with a mission to accelerate the productive uses of information technologies for the benefit of higher education worldwide. There is also a very clear presentation from Jeffrey Shields, President of The Crustacean Society, on publishing a specialty journal.

The BioOne subscription cycle is getting ready to start; please contact Nylink Services for a quote: [services@nylink.org](mailto:services@nylink.org).

## Cooperative Services Contact Information

Please contact Tatiana Sahm ([sahmt@nylink.org](mailto:sahmt@nylink.org)) or Jen Stelling ([stellingj@nylink.org](mailto:stellingj@nylink.org)) at Nylink with your questions. They are available via email or phone (800-342-3353 / 518-443-5444).

## OCLC FIRSTSEARCH NEWS

### PSYCINFO 1887 – A New Name

The *PsycINFO 1887* database on FirstSearch has a new name: *PsycINFO*. Z39.50 sites that use the entire database name must replace “PsycINFO\_1887” with “PsycINFO” or “psi3.” Z39.50 sites that use the short name “psi3” for this database do not need to make any changes to their implementations. Libraries that use automatic logon capability to access FirstSearch either through IP-address recognition or the OCLC WebScript CGI application do not need to make any changes to their URLs or scripts. OCLC has created an alias for the database name.

### OCLC FirstSearch: The Basics – A New Quick Reference Brochure

This 8-page quick reference brochure provides an overview of FirstSearch information for the new or experienced FirstSearch librarian to make effective use of the FirstSearch end-user interface, the FirstSearch Administrative Module and the OCLC Usage Statistics Web site.

*OCLC FirstSearch: The Basics* is available online in PDF at: <<http://www.oclc.org/support/documentation/firstsearch/using/basicsrefcard/FSbasics.pdf>>.

### Open WorldCat/WorldCat.org – Article Citations Added

Article-level citation records from four FirstSearch databases – *ArticleFirst*, *ERIC*, *GPO* and *Medline* – have been added to OpenWorldCat/WorldCat.org.

To find these article citations, conduct a search at <<http://worldcat.org>>, then limit your search results under “Refine Your Search” by clicking “Article” under “Format.” IP-address information determines which libraries are displayed to end-users.

OpenWorldCat is the OCLC concept of increasing the visibility of WorldCat-member libraries by placing their WorldCat holdings on Google and Yahoo! so that they can be discovered via the Web. WorldCat.org is the destination Web site for searching for these holdings.

### OCLC FirstSearch Contact Information

For more information about OCLC FirstSearch, please contact Nylink's Joyce Rambo ([ramboj@nylink.org](mailto:ramboj@nylink.org)) or Jennifer Hawkes ([hawkesj@nylink.org](mailto:hawkesj@nylink.org)).



## The Use of Future Date in WorldCat Resource Sharing

If you are the lender and don't have the requested item on hand, but expect to in the future, click Future Date and enter a date in the YYYYMMDD format. Then click Update. The system responds with a message confirming that the record was updated. The request goes to the next Lender in the Lender list to see if another Lender can fill the request earlier. If none can, the request will come back to you on the date you specify. The request also appears in the borrowers Request Manager under the status Retry with the future date. Once the Future Date occurs, the status changes to Retry/Pending.

[OCLC – edited]

## OCLC Usage Statistics

OCLC Usage Statistics gives you access to OCLC statistical reports for your institution. To logon to OCLC Usage Stats, go to: <<http://www.stats.oclc.org/cusp/nav>> and use any OCLC authorization for your library.

A list of available Resource Sharing reports are appears below:

- Resource Sharing Borrower Reasons For No Report
- Resource Sharing Lender Reasons For No Report
- Borrower Resource Sharing Stats Report
- Lender Resource Sharing Stats Report
- Strategic Union List Report
- Borrower Activity Overview Report
- Lender Activity Overview Report
- Borrower Transaction-Level Detail Report
- Lender Transaction-Level Detail Report
- eSerials Requests by Journal Title Report
- Serials Request Overview Report

## Auto Deflection of E-Audio Books Now Available

The format e-audio book has been added to the deflection formats for automated resource sharing deflection.

Deflection will streamline your ILL workflow, and reduce turn-around time, by automatically moving some requests away from libraries that cannot fill them. Instead of a request remaining in the pending status waiting for potential lenders to manually deny the request, the Request Manager skips lenders based on deflection policies, and automatically moves the request to the next lender in a matter of seconds. This feature benefits all users of WorldCat Resource Sharing, OCLC ILLiad and other resource sharing systems that send requests through OCLC Resource Sharing.

For requests to be deflected you must set up separate deflection records in the Policies Directory.

Through the Policies Directory, lenders are able to set deflection criteria for borrowing requests based on three criteria:

- Service type – copies, loans, or copies and loans

- Format type – 23 formats

Archival/Mixed Material	Microform
Book	Musical Score
Computer File	Newspaper
E-Audio Book	Serial
E-Serial	Sound Recording
E-Text	Sound Recording - Cassette
Government Document	Sound Recording - CD
Integrated Resource	Sound Recording - LP
Internet Resource	Visual Material
Kit	Visual Material - DVD
Manuscript	Visual Material - VHS
Map	

- Group membership – OCLC profiled group such as LAND or ZERO

Deflection policies read from information contained in the bibliographic record for individual items. OCLC is unable to perform deflection based on specific collections such as Reference, Genealogy, Juvenile Materials, etc.

### Resource Sharing Contact Information

Please contact Jon Penn, Resource Sharing Librarian at Nylink, with questions. Jon is available via email ([pennj@nylink.org](mailto:pennj@nylink.org)) or phone (800-342-3353 / 518-443-5444).

