Cataloging, OCLC, Minitex, and You: Past, Present, & Future

Spearfish, SD
October 7, 2011
Presented by: Carla Dewey Urban

Minitex Bibliographic & Technical Services
Agenda for Today

Forty Years of Collaboration

Our Services

Cataloging Update
  • RDA/OCLC, RDA Training
  • LC Genre Headings
  • Contract Cataloging

OCLC Update
  • Resource Sharing Enhancements
  • Connexion Client 2.30

Digitization Update
  • CONTENTdm 6.0/6.1
40 Years of Collaboration
1971-2011
40 Years of Collaboration

1967: The Ohio Computer Library Center was established to develop a cooperative regional computerized network for 54 Ohio academic libraries.

1969: Minnesota Interlibrary Teletype Experiment (MINITEX) - a 2 year pilot project to provide cost, volume and operational data to develop recommendations for a long-range statewide ILL service.

1971: The MN State Legislature approved funding and the Minnesota Interlibrary Teletype Exchange (MINITEX) was established with Alice Wilcox as Director.

OCLC launches the shared cataloging subsystem.

(So it’s WorldCat’s 40th anniversary, too!)
Minitex, OCLC, and You

1976: Bush and Kellogg Foundation Grants to support Minitex participation in OCLC (still called Ohio College Library Center then) received. Minitex joined OCLC so that libraries:
  • could begin to more efficiently locate monographs for Resource Sharing
  • could reduce costs and improve processing time in cataloging

1978: A contract for Minitex services was signed with the South Dakota State Library (for Resource Sharing Services)
  A $25,000 grant from the Bush Foundation supported the production of South Dakota Union List of Serials as a subset of MULS

1979: The OCLC ILL subsystem goes online.  
  SD Historical Resource Center, SD State Library and USD were undergoing reclassification projects.

1983: Only 11 Minitex libraries had more than 2 OCLC terminals.
OCLC Membership: Then

1978

1st South Dakota libraries to join OCLC were:

Many South Dakota libraries began using OCLC through BCR, and then switched their network affiliation in the 80s.

---

30 Wilson Library • 309 19th Avenue South • University of Minnesota • Minneapolis, Minnesota 55455

March 24, 1978

TO: Vince Anderson
   Bob Carmack
   Helen Hoyt
   Philip McCauley

FROM: Alice Wilcox

We are delighted with the South Dakota/Minnesota contract for shared library resources. As part of this contract, three of your libraries were designated as recipients of Bush Foundation support to build a database by utilizing OCLC. In order to implement OCLC installation and participation as expeditiously as possible, we have scheduled the following meetings:

May 8. South Dakota School of Mines & Technology and Rapid City Public Library.


May 10. University of South Dakota-Vermillion

We will be arriving in Rapid City at 9:12 a.m. on the 8th. All meetings will begin at 10 a.m. and we should be able to conclude our work by 3 p.m.
Now: 23 SD libraries are full OCLC Cataloging users, and 49 use CatExpress.

- Alexander Mitchell Public Library
- Augstana College
- Avera McKennan Hospital Library
- Black Hills State University
- Brookings Public Library
- Dakota State University
- Dakota Wesleyan University
- Mitchell Public Library
- Mount Marty College
- National American University
- Northern State University
- Oglala Lakota College
- Presentation College
- Rapid City Public Library
- SD School of Mines & Technology
- SD State Archives
- SD State Library
- SD State University
- Siouxland Libraries
- U of SD - I.D. Weeks Library
- U of SD - Law Library
- U of SD - Medical School (Wegner) - Sioux Falls
- University of Sioux Falls
- Watertown Regional Library
- Bismarck Public Schools (21 schools) Group
- North Dakota CatExpress Group (45 institutions)
Anniversary Fun
http://www.minitex.umn.edu/40th

SDLA
Anniversary Reception (yesterday)

On the Web

Oral History Interviews
Interviews that help tell the story of Minitex and participating libraries and capture the voice and experience of some of our library innovators. Interviewees were asked to reflect on the early years of Minitex; from the two-year pilot project that was the Minnesota Interlibrary Teletype Experiment (1969-1970) to the present.

Minitex Then and Now
A collection of images highlighting how much some things have changed, and how others are still very much the same.

Facebook (go ahead and “like” us on FB!)
Minitex Then and Now

Minitex Training and Travel: Then

Providing training sessions and interacting with staff of Minitex participating libraries used to involve lots of travel. Hand-drawn maps and bison blocking the road were not unheard of, and many Minitex staffers have interesting stories about adventures experienced while travelling throughout Minnesota and the Dakotas.

Listen to one such adventure in the oral history interview with former Minitex staff member, Mary Rae Oxborrow (about 6 minutes into the recording).

Pictured (left): Adventures in North Dakota.
Our Services
About Us
Minitex Bibliographic & Technical Services

We provide training, services and resources pertaining to:

• OCLC
• Cataloging Rules and Applications
• Digitization & Metadata

More About Our Services
http://www.minitex.umn.edu/Training/SelfPaced/batsintro/batsintro.html
Training Topics

Then:
- Automation (Library Directors spent 2 days at a 1976 workshop: *Using Automation*. “If you don’t use automation it will probably use you.”)
- Workflow
- Computer-assisted cataloging
- AACR2

Now:
- OCLC Connexion, CONTENTdm, and other OCLC products
- RDA
- Metadata (e.g. Dublin Core)
Libraries Participating in Our Training

FY2011

- South Dakota: 33
- 49
- 82
- 127

MN
ND
SD
WI
Other US
Foreign
Number of Participants in Our Training

FY2011

South Dakota

126

148

4

114

125

567

MN
ND
SD
WI
Other US
Foreign
BATS Staff

Carla Dewey Urban

Sara Ring

Mark Wilhelmi

Mark Ehlert
Communications

Minitex/OCLC Mailing

Minitex OCLC Contacts Listserv
Recommend at least one primary staff person at each institution subscribe

Blog
http://blog.lib.umn.edu/minitex/bats

Flickr
http://www.flickr.com/photos/mtxbats

Twitter
http://twitter.com/minitexbats

Facebook
http://www.facebook.com/MinitexMN
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**MAIN ENTRY**

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<th>A5</th>
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**EDITION**

| EDITION            | 250 |       |               | EDITION            | 250 |       |               |

**RELEASE/PUBLICATION**

| RELEASE/PUBLICATION | 260 |       |               | RELEASE/PUBLICATION | 260 |       |               |

**PHYSICAL DESCRIPTION**

| PHYSICAL DESCRIPTION | 300 |       |               | PHYSICAL DESCRIPTION | 300 |       |               |

**SERIES**

| SERIES             | 490 |       |               | SERIES             | 490 |       |               |

**NOTES**

| NOTES              | 50  |       |               | NOTES              | 50  |       |               |

**CONTENTS**

| CONTENTS           | 505 |       |               | CONTENTS           | 505 |       |               |

**SUBJECT**

| SUBJECT           | 6   |       |               | SUBJECT           | 6   |       |               |
RDA Implementation

• Adoption: “No sooner than January 2013”
• Conditional implementation
• Nine action items, including:
  • “Re-word” RDA into English
  • Improve RDA Toolkit usability
  • Make progress on devising successor to MARC
  • Solicit from vendors prototype catalogs that use RDA data to their fullest extent
• Executive summary and full report: z.umn.edu/4go
RDA Implementation

- Get to know RDA between now and 2013
  - Participate in training efforts (RDA and FRBR/FRAD)
  - Familiarize yourself with RDA Toolkit or RDA Print
  - Read articles and books on RDA
  - Review/revise local practices and documentation
  - Networking within and outside your library
  - Practice, practice, practice
MARC Development and the Future

• Bibliographic Framework Transition Initiative
• Determine path toward a successor to MARC standard
  • Ingredients for a robust container for library metadata
  • Forward-looking and backwards-compatible
  • Friendly to the Web
• LC as gatekeeper for post-MARC standard?
• MARC development continues in the interim
• BFTI website: z.umn.edu/4fr
Library of Congress Genre/Form Thesaurus (LCGFT)

• What are genre and form headings?
• Describe what a library resource is, not what it is about
  • *Lord of the Rings* is a fantasy film, about Frodo Baggins
  • *Hudson's Twin City Street Atlas* is an atlas and road map, about the Twin Cities metropolitan area
  • *Filing for Chapter 13 Bankruptcy* is a legal guide for non-professionals, about U.S. bankruptcy law
• Goal: To direct catalog users to specific formats and categories of material
Library of Congress Genre/Form Thesaurus (LCGFT)

- LCGFT: New genre/form heading resource for bibliographic records
- Sample headings in MARC format
  - 655 -7 Topographic maps. ‡2 lcgft
  - 655 -7 Court decisions and opinions. ‡2 lcgft
  - 655 -7 Western films. ‡2 lcgft
- Genre/form records appear in LC Authority File
- Thesaurus may be available in print form in the future
Library of Congress Genre/Form Thesaurus (LCGFT)

- Categories of materials getting LCGFT terms
  - *Moving image works*
  - *Non-musical sound recordings*
  - *Cartographic resources*
  - *Law materials*
  - Music resources
  - Literature
  - Religious materials
Library of Congress Genre/Form Thesaurus (LCGFT)

- To find genre/form headings
  - LC Authorities file
    - authorities.loc.gov
    - Connexion Client and Connexion Browser
  - LC Authorities & Vocabularies site
    - id.loc.gov
  - Classification Web
    - Select Search Genre/Form Terms
- FAQ and other LCGFT resources: z.umn.edu/4gq
OCLC Update
OCLC WorldCat Resource Sharing Updates:

- Three new basic Resource Sharing features
- Direct Request for e-books
- New and revised reports
- New article-sharing site
New Resource Sharing Features

The ALERT field

ALERT field and category

The citation is invalid, we cannot supply this item as it is currently listed. Please check the source.
New Resource Sharing Features:
Segment your workflow into **Loans** and **Copies**

- **PENDING** and **IN PROCESS**
  - Loan: For book-based requests
  - Copy: For article requests
New Resource Sharing Features
The ability to request from non-suppliers

Email ILL request to non-WorldCat Resource Sharing libraries
Direct Request for e-books

OCLC ILL Direct Request sends patron-generated requests to WorldCat Resource Sharing.

Direct Request for e-books routes user requests back to you (with a link to the item) for material you own or for freely-available materials.

Uses profile in the WorldCat Knowledge Base for open access e-content and subscription-based e-content for books.

Part of your subscription to Resource Sharing or ILLiad at no additional charge.
E-books from Ingram’s MyiLibrary

- Access through WorldCat Resource Sharing to e-book content not in a library’s collection
- Over 50,000 titles
- Available for a nine day period
- Fee-based through Interlibrary Loan Fee Management (IFM)
New & Revised Reports

Global Information System (GIS) Report
Gives a geographic-based view of all OCLC member libraries that lend or borrow through OCLC.

Reasons for No Report
Now includes the imprint date of the material.

Reciprocity Report
Provides the state locations of the libraries listed.

Lender String Report
Provides up to 12 months of data about the number of times any library said 'Yes' or 'No' to your requests as a borrower.
OCLC Article Exchange
http://experimental.worldcat.org/AE/

- Single, secure location
  - Lending libraries can place PDF & TIFF articles here
  - Users can retrieve them from anywhere in the world
- Integrates with Resource Sharing, ILLiad, WorldCat Navigator
- Eliminates file size & security issues
- Automatic deletions support copyright guidelines
- Minimal tech support required
- Accessible from PCs, Macs or any operating system
Connexion

BE: Notice for next MINITEX/OCUL mailing

M300 Workstation

Questions & Answers

Contents
Connexion Client 2.30

• Time table
  • Released – April 12, 2011
  • Last day for Client 2.10 & 2.20 is October 31
  • You must upgrade to Client 2.30 before November 1

• “Getting Started with OCLC Connexion Client”
Connexion Client 2.30

Enhancements

- Display of 029 fields
- Language of Cataloging
- MARC Updates
- Option to export workforms
- Linking to the RDA Toolkit
- Macro changes
### Display of 029 Fields

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‘Language of Cataloging’ Limiter

Cataloging ➔ Search ➔ WorldCat
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<td>1</td>
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MARC Updates

- New search indexes
  - e.g. Language of Cataloging, National Bibliography Number

- Revised list of languages for limiting searches
  - Updated spellings, new & revised codes

- New material types: Blu-ray discs, U-matic, NTSC, ATSC

- “Form” element added to fixed fields in Computer File workform
  - The codes are "o" and "q" (remote and direct access, respectively).

Exporting Workforms

Tools → Options → Export → Allow Export of Workforms
RDA Toolkit Link

Tools → Options → RDA Toolkit

Options

- Enable the RDA Toolkit
- Enter your RDA Toolkit username:
  minitex-ida
- Enter your RDA Toolkit password:
RDA Toolkit Link (cont.)

Tools → RDA Toolkit
RDA Toolkit Link (cont.)

MARC Tag 245

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<td><strong>Core SubElement: Title Proper</strong></td>
<td>The chief name of a resource (i.e., the title normally used when citing the resource).</td>
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<tbody>
<tr>
<td><strong>SubElement: Other Title Information</strong></td>
<td>Information that appears in conjunction with, and is subordinate to, the title proper of a resource.</td>
</tr>
<tr>
<td><strong>SubElement: Parallel Title Proper</strong></td>
<td>The title proper in another language and/or script.</td>
</tr>
<tr>
<td><strong>SubElement: Parallel Other Title Information</strong></td>
<td>Other title information in a language and/or script that differs from that recorded in the other title information element.</td>
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<td><strong>SubElement: Other Title Information</strong></td>
<td>Information that appears in conjunction with, and is subordinate to, the title proper of a resource.</td>
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Macro Changes

• New Macro
  • Add33x will add fields 336, 337, and 338 to RDA records

• Changes
  • Existing macros Add&Edit007, AddAuthority6xx, AddSerialNotes, and Generate891 updated to reflect changes in the MARC format

• New macro command – InsertFromCitedRecord

• Caution
  • Store all of your macros in macro books that you create – not the default Connexion client macro books
Macro Changes (cont.)

Tools → Macros → Manage → Macro → OCLC → Add33x → Run

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<tr>
<td>049</td>
<td>TQII</td>
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<tr>
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<td>1 0 Above the coffee shop: +b a novel / +c by Antoine Bellefontaine</td>
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<td>1 3 Coffee shop</td>
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<td>260</td>
<td>Paris: +b Imagination House Press; +a Ottawa: +b Steward Pub</td>
</tr>
<tr>
<td>300</td>
<td>iv, 210 pages: +b illustrations; +c 25 cm</td>
</tr>
<tr>
<td>710</td>
<td>2 Imagination House Press, +e publisher.</td>
</tr>
<tr>
<td>Field</td>
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<td>2009655201</td>
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<td>040</td>
<td>DLC eng DLC rda DLC PHA</td>
</tr>
<tr>
<td>049</td>
<td>TQII</td>
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<td>100</td>
<td>1 Bellefontaine, Antoine, novelist.</td>
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<tr>
<td>245</td>
<td>0 Above the coffee shop: a novel by Antoine Bellefontaine</td>
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<tr>
<td>246</td>
<td>3 Coffee shop</td>
</tr>
<tr>
<td>250</td>
<td>1st edition.</td>
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**Add Fields 336, 337, and/or 338**

- **336 - Content Type**
  - text
- **337 - Media Type**
  - unmediated
- **338 - Carrier Type**
  - Audio
  - Computer
  - Microform
  - Microscopic
  - Projected Image
  - Stereographic
  - Video
  - Unspecified

For 338 - Carrier Type, select a term from only one carrier type category on the left.
Macro Changes (cont.)

| 010 | 2009655201 |
| 040 | DLC +b eng +c DLC +e rda +d DLC +d PHA |
| 049 | TQII |
| 100 | Bellefontaine, Antoine, +e novelist. |
| 245 | Above the coffee shop: +b a novel / +c by Antoine Bellefontaine; neighborhood sketches by Teri Bellefontaine. |
| 246 | Coffee shop |
| 250 | 1st edition. |
| 300 | iv, 210 pages: +b illustrations; +c 25 cm |
| 336 | text +2 rdacontent |
| 337 | unmediated +2 rdamedia |
| 338 | volume +2 rdacarrier |
| 700 | Bellefontaine, Teri, +e illustrator. |
Web-scale Management Services

- Cooperative Management Service for Libraries
- Moving Routine Functions to the Web
- Lower Costs for management services & disparate systems
- Eliminating many support issues
- Sharing solutions with other WSM users
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CONTENTdm 6.0/6.1
CONTENTdm 6.0 New End User Interface Redesign!!
CONTENTdm 6.0/6.1
New Image Viewer
6.0 Preview

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http://sandbox.contentdm.com

Bismarck Public Library
http://content.bismarcklibrary.org/cdm

Iron Range Research Center
http://ironrange.cdmhost.com/cdm

University of Minnesota, Morris
http://contentdm.morris.umn.edu/cdm
Upper Midwest CONTENTdm User Group

ND, SD, MN, and WI CONTENTdm users

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