Z39.50 library resources: Overview and needed information

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Find Z39.50 library resources for more information about how FirstSearch Z39.50 resources features work.

Overview

Z39.50 is an ANSI/NISO standard that specifies a client/server-based protocol for information retrieval. While libraries often make their resources (library catalogs or databases) available to the public via an HTTP (web-based) interface, many resources can also be searched using the Z39.50 protocol. For example, you can help your users obtain the items they need by letting them view holdings information retrieved from any Z39.50-compatible library catalogs you choose. Depending on the catalogs and the information you provide in the WorldCat Services Administrative Module, the holdings information might include local call number, the location and availability of the items, or other information.

Note: To learn whether a resource is Z39.50-compatible, contact its local system administrator or vendor. More information about the Z39.50 protocol is available here.

How the FirstSearch Z39.50 library resources feature works

The following describes how the FirstSearch Z39.50 Library Resources feature works:

1. You gather the information needed to add your chosen Z39.50-compatible library resources. If you do not have the information, consult the local system administrator or vendor for each resource that you want to add.

2. In the administrative module, you turn on the feature for testing by adding and saving the needed information about each resource. To go to the feature in the administrative module, click Z39.50 Library Resources in the Linking section of the main menu.

3. You test the feature in the FirstSearch test system.

4. You make and save any needed changes in the administrative module.

5. When testing is complete, you change the status of each resource from test to live in the administrative module to turn on the feature for live use by your users in the FirstSearch service.

6. Your users see a link for viewing local ownership information when they view a FirstSearch detailed record.

7. When a user clicks the link, FirstSearch requests and displays the information from the library resources.

8. The user prints or notes the information for use in obtaining the item.

Information needed to add a Z39.50 library resource to FirstSearch

This section helps you gather the information that you must enter in the administrative module in order to add a Z39.50
library resource. If you write the needed information in a copy of this section, you can easily enter it in the administrative module. If you do not have the information already, consult the local system administrator or vendor for each resource that you want to add. The maximum number of Z39.50 library resources you can add is 15.

In the administrative module, you enter the information for each resource on a series of screens. Then you view a summary screen to review, confirm, and save the information for a resource.

**Available screens**

**Name screen**

The following fields for entering information are included on the Name screen.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>YOUR VALUE</th>
<th>DESCRIPTION OF FIELD</th>
<th>NOTE ABOUT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interface Display Name</td>
<td></td>
<td>Contains the name of the resource as you want it to appear to your users in FirstSearch.</td>
<td>Maximum 40 characters/spaces</td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td>Brief description of the contents of the database, for example: &quot;Ohio State University catalog of vintage comic books.&quot;</td>
<td>Maximum 85 characters/spaces</td>
</tr>
<tr>
<td>Enter OCLC Symbol</td>
<td></td>
<td>An existing OCLC symbol for a Z39.50 library resource.</td>
<td></td>
</tr>
<tr>
<td>Select OCLC Symbol</td>
<td></td>
<td>Any existing OCLC symbols added in Enter OCLC Symbol.</td>
<td></td>
</tr>
<tr>
<td>Find Symbols</td>
<td>N/A.</td>
<td>Click Participating Institutions Search to find the OCLC symbol for the library.</td>
<td></td>
</tr>
<tr>
<td>Authorization</td>
<td></td>
<td>If the Z39.50 resource requires an authorization and password to gain access, use this field to enter the authorization (user name/login) for the database.</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
<td>If the Z39.50 resource</td>
<td></td>
</tr>
</tbody>
</table>
### Connection screen

The following fields for entering information are included on the **Connection** screen.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>YOUR VALUE</th>
<th>DESCRIPTION OF FIELD</th>
<th>NOTE ABOUT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Z39.40 Server Database Name</td>
<td></td>
<td>Contains the name used by the resource’s Z39.50 server to identify the resource (sometimes known as the short database name).</td>
<td>Maximum 255 characters/spaces.</td>
</tr>
<tr>
<td>Server Host Name</td>
<td></td>
<td>Contains the fully-qualified host name or IP address of the resource's Z39.50 server.</td>
<td>Maximum 255 characters/spaces. The only permitted host name characters are A through Z, a through z, 0 through 9, period (.), and dash (-).</td>
</tr>
<tr>
<td>Server Port</td>
<td></td>
<td>Contains the port to which FirstSearch connects on the resource's Z39.50 server.</td>
<td>A number, 1 to 65535.</td>
</tr>
</tbody>
</table>

### Search Settings screen

The following fields for entering information are included on the **Search Settings** screen.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>YOUR VALUE</th>
<th>DESCRIPTION OF FIELD</th>
<th>NOTE ABOUT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query Type</td>
<td></td>
<td>Contains the Z39.50 query protocol used by the resource's Z39.50 server.</td>
<td>Select 1 or 101.</td>
</tr>
<tr>
<td>Use Element Set Names</td>
<td></td>
<td>Indicates whether the resource supports named</td>
<td>Select True (supports named element sets)</td>
</tr>
<tr>
<td>FIELD</td>
<td>YOUR VALUE</td>
<td>DESCRIPTION OF FIELD</td>
<td>NOTE ABOUT VALUE</td>
</tr>
<tr>
<td>-------</td>
<td>------------</td>
<td>----------------------</td>
<td>------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>element sets.</td>
<td>or False (does not support named element sets).</td>
</tr>
<tr>
<td>Only Use &quot;default&quot; Result Set Name</td>
<td></td>
<td>Indicates whether the resource's Z39.50 server supports only &quot;default&quot; as the name of result sets.</td>
<td>Select True (supports only &quot;default&quot;) or False (supports named result sets).</td>
</tr>
<tr>
<td>Record Syntax</td>
<td></td>
<td>Contains the record syntax used for holdings information in the catalog.</td>
<td>Select OPAC or MARC21. If you select MARC21, you have to enter the appropriate information on the Holdings Information screen.</td>
</tr>
</tbody>
</table>

**Index Edit screen**

The following fields for entering information are included on each Index Edit screen. Use a separate screen for each index. Record your values in the following table.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>YOUR VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Use</td>
<td></td>
</tr>
<tr>
<td>Structure</td>
<td></td>
</tr>
<tr>
<td>Relation</td>
<td></td>
</tr>
<tr>
<td>Completeness</td>
<td></td>
</tr>
<tr>
<td>Truncation</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td></td>
</tr>
</tbody>
</table>

The following table describes the information that you enter on an Index Edit screen.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF FIELD</th>
<th>NOTE ABOUT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Can be ISBN, ISSN, OCLC, AUTHOR, KEYWORD, SOURCE,</td>
<td>Select a name from the drop-down list, add a new index, or rename an</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION OF FIELD</td>
<td>NOTE ABOUT VALUE</td>
</tr>
<tr>
<td>-----------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>STANDARD NUMBER, SUBJECT, TITLE, YEAR, a new name for an existing index, or a new index.</td>
<td>existing index. Select only those that can be searched in the resource. Maximum of 42 characters/spaces for new or renamed indexes. Index names are not case sensitive.</td>
<td></td>
</tr>
<tr>
<td>Use</td>
<td>Contains the numeric value of the Use attribute used to retrieve information from a Z39.50 resource.</td>
<td>A number. Note: Use attributes represent indexes in the Z39.50 standard. The standard defines approximately 1,000 indexes - for example, 4 is the use attribute for TITLE - but others can be defined if necessary.</td>
</tr>
<tr>
<td>Structure</td>
<td>Contains the Structure attribute.</td>
<td>Click the drop-down arrow to display the list of values from which you may select. The values commonly used for ISBN, OCLC record number, or ISSN are 1 - phrase or 2 - word.</td>
</tr>
<tr>
<td>Relation</td>
<td>Contains the Relation attribute; this field is optional.</td>
<td>Click the drop-down arrow to display the list of values from which you may select. The value most commonly used is None.</td>
</tr>
<tr>
<td>Completeness</td>
<td>Contains the Completeness attribute; this field is optional.</td>
<td>Click the drop-down arrow to display the list of values from which you may select. The value most commonly used is None.</td>
</tr>
<tr>
<td>Truncation</td>
<td>Contains the Truncation attribute; this field is optional.</td>
<td>Click the drop-down arrow to display the list of values from which you may select. The value most commonly used is None.</td>
</tr>
<tr>
<td>Position</td>
<td>Contains the Position attribute; this field is optional.</td>
<td>Click the drop-down arrow to display the list of values from which you may select. The value most commonly used is None.</td>
</tr>
</tbody>
</table>

**Holdings Information screen**

The following fields for entering information are included on the Holdings Information screen.

Note: If the MARC21 record syntax is used for holdings information in the catalog, you may want to request printouts of representative catalog records with holdings information. Reviewing the printouts will help you determine which fields and subfields contain holdings information and which ones you want to display to your users.
Holdings Field

If the MARC21 record syntax is used, contains the tag for the field containing the holdings information. If the holdings information is contained in a single subfield, supply the field tag and subfield code. Leave this field blank if OPAC record syntax is used.

MARC21 field tags and subfield codes containing holdings information vary by catalog. For example, if the holdings information is contained in the 852 field, type 852. If it is contained in subfield 1 of the 852 field, type 852/1.

Change Subfield Order

Specifies the order in which the parts of the holdings information are displayed to users in FirstSearch.

Change the order, if needed, after you add all the parts of the holdings information.

**MARC21 Holdings Subfield edit screens**

The following fields for entering information are included on each MARC21 Holdings Subfield edit screen. Use a separate screen for each part of the holdings information that you want to display with its own label. Record your values in the following table. The maximum number of parts of holdings information that you can display is 25.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>YOUR VALUE FOR PART 1</th>
<th>YOUR VALUE FOR PART 2</th>
<th>YOUR VALUE FOR PART 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subfield(s) of the holdings field</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FIELD</th>
<th>YOUR VALUE FOR PART 4</th>
<th>YOUR VALUE FOR PART 5</th>
<th>YOUR VALUE FOR PART 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subfield(s) of the holdings field</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following table describes the information that you enter on a MARC21 Holdings Subfield edit screen.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION OF FIELD</th>
<th>NOTE ABOUT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Contains the label for a part of the holdings information that will be displayed to</td>
<td>Maximum 40 characters/spaces; for example, Call number, Location, Availability, Call</td>
</tr>
<tr>
<td></td>
<td>your users in FirstSearch.</td>
<td>Number/Location.</td>
</tr>
<tr>
<td>Subfield(s) of the holdings field</td>
<td>Contains the subfield code or codes containing a part of the holdings information.</td>
<td>For example, 5. If this part of the holdings information is contained in multiple</td>
</tr>
<tr>
<td></td>
<td></td>
<td>subfields, type the subfields in the order in which they should be displayed. For</td>
</tr>
<tr>
<td></td>
<td></td>
<td>example, 5, 4, 7.</td>
</tr>
</tbody>
</table>

**Status screen**

The following fields for entering information are included on the **Status** screen.
### Production Status
Contains the status of the resource in FirstSearch: **Test** (FirstSearch test system only) or **Live** (FirstSearch service and test system).

Select **Test**. Then, after testing is completed, return to the administrative module and select **Live**.

Field appears only if you have purchased the Z39.50 FirstSearch Gateway feature. You must place any newly-created catalogs in live mode before they can be placed in individual display mode. Existing catalogs in live mode are automatically available for individual display.

Note: Z39.50 Gateway subscribers cannot configure FirstSearch resources as Z39.50 resources.

### Make catalog available stand-alone
If checked, makes the Z39.50 catalog available for individual search.

The term "primary catalog" refers to the catalog that belongs to the institution associated with the authorization under which you are logged on.

### Primary Catalog
If checked, designates that the catalog displayed on the **Status** screen (for example, **OSU:Status**) is the primary catalog.

### Place Hold screen
The following fields for entering information are included on the **Place Hold** screen.

### Local System Host and Port
A local system host and port string that identifies the local system you want to define for authenticating patron access.

**Example:**
https://sp03e15.prod.oclc.org:4103

### Item ID Subfield
A MARC21 subfield code

Does not appear unless
<table>
<thead>
<tr>
<th>FIELD</th>
<th>YOUR VALUE</th>
<th>DESCRIPTION OF FIELD</th>
<th>NOTE ABOUT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>(one number or letter)</td>
<td></td>
<td>you are specifying NCIP place hold attributes for a catalog whose holdings are displayed in MARC21 syntax.</td>
<td></td>
</tr>
<tr>
<td>Pick-up locations</td>
<td></td>
<td>Branches or department locations where loaned items can be picked up.</td>
<td>To name, rename, or delete a pick-up location, click on the <strong>Pick-up locations</strong> link to bring up the Pick-up Locations screen.</td>
</tr>
<tr>
<td>Success Message</td>
<td></td>
<td>Custom text, seen by the user, indicating a successful place holds transaction.</td>
<td>Limit of 255 characters/spaces.</td>
</tr>
<tr>
<td>Allow Place Holds with</td>
<td></td>
<td>If box is checked, indicates that charging a fee for place holds is allowed.</td>
<td></td>
</tr>
<tr>
<td>Fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>scheme</td>
<td></td>
<td>The target institution.</td>
<td></td>
</tr>
<tr>
<td>value</td>
<td></td>
<td>The target institution's FirstSearch authorization.</td>
<td></td>
</tr>
</tbody>
</table>