NACO Review in Connexion

Prepared by LC Coop Team
In consultation with OCLC staff
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Review in Connexion does not use the traditional Passport review file procedures.

Here is a quick presentation on how libraries can send records and how reviewers can see them. We consulted OCLC colleagues for accuracy, but this is not their official presentation.

OCLC Institution Symbols

- NACO records continue to use MARC organization codes in the 040
- The official site for MARC codes remains at LC:
- http://lcweb.loc.gov/marc/organizations/
- Review procedures in OCLC Connexion required use of OCLC Institution Symbols

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Always use MARC codes in the 040 of an authority record. The MARC codes are built into your record templates when you apply for a NACO authorization.

It's only the review process that uses the OCLC institution symbols for libraries.

Participating Institutions Search

- Search for OCLC Institution Symbols at:
http://www.oclc.org/contacts/libraries

- OCLC institution symbols and MARC organization codes may not have a one-to-one relationship

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These codes were developed for similar purposes, but were created by two different organizations. Don't be surprised that they don't match exactly.

Happily, we have online search sites for both sets of identification codes.

Search for OCLC Institution Symbols at:
http://www.oclc.org/contacts/libraries

Here's the top of the screen. You need not fill in all the boxes to get a result.

Scroll to the bottom to enter the MARC organization code.

Bottom of the screen to convert MARC 21 codes to OCLC Institution Symbols

Type in the MARC 21 code and click on Start Search

OCLC symbols and MARC codes may not have a one-to-one relationship

Search Results for: USMARC="InU"

Symbol	Institution Name & Address Network/Service Center/International Division	System Code ILL Policy IFM Full Text	USMARC Code	Groups
EAD	ENGLISH & AM DRAMA OF THE 19TH CENT BLOOMINGTON, IN 47405 UNITED STATES INCOLSA	Coll Sets Inact NONSUPPLIER IFM: N	InU	None
IIL	INDIANAPOLIS LAW CAT CONSOR INDIANAPOLIS, IN 46202 UNITED STATES INCOLSA	Cataloging NONSUPPLIER IFM: N	InU-L	GAC: LEGL
IJZ	INDIANA UNIV, ARCH OF TRADITIONAL MUSIC BLOOMINGTON, IN 47405 UNITED STATES INCOLSA	Cataloging NONSUPPLIER IFM: N	InU-AT	GAC: CI#C XG: FS@W, ILSU

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Notice that the first name, English and American Drama, has the MARC code InU and the OCLC institution symbol EAD.

**Searching MARC code InU brings up 20 records,
all with different OCLC Institution Symbols**

IUG	INDIANA UNIV, MUSIC LIBR BLOOMINGTON, IN 47405-1801 UNITED STATES INCOLSA	Cataloging NONSUPPLIER IFM: N	InU-MU	None
IUH	INCOLSA PROC CTR, HEALTH SCI LIBR COOP INDIANAPOLIS, IN 46268-2536 UNITED STATES INCOLSA	Cataloging NONSUPPLIER IFM: N	InU-M	SUL: NEPU XG: ILSU
IUL	INDIANA UNIV BLOOMINGTON, IN 47405-3907 UNITED STATES INCOLSA	Tapeloading SUPPLIER, $ OUT OF STATE IFM: Y	InU InBloIUH	GAC: CI#C, ILLD, RFBP SUL: NEPU XG: FS@W, ILSU, LTQR
IUM	INDIANA UNIV, SCH OF MED LIBR INDIANAPOLIS, IN 46202-5121 UNITED STATES INCOLSA	Cataloging $, SUPPLIER IFM: N	InU-M	GAC: CI#C SUL: NEPU XG: FS@W, GM#L, ILSU

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On this screen, the MARC code InU is used for Indiana University, which has a different OCLC symbol, IUL.

Also, on this page, MARC code InU-M is used for both the Health Science Library and the School of Medicine Library, but they have different OCLC symbols. The Health Science Library uses IUH and the School of Medicine uses IUM.

Don't depend entirely on the codes you find online!

Share Codes

- DLC is the code to use for review at LC; it is the same in MARC and OCLC codes
- Reviewers and their libraries should talk to each other about the MARC and utility institution symbols they will use
- NACO libraries should set preferences for the reviewers that have been assigned by the NACO Coordinator

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When NACO contributors and NACO reviewer are assigned, be certain that you are clear on what codes to use for the review process.

Technically, you could set a preference for anyone to see your record, but for NACO review, we ask that you set preferences for the designated reviewer.

Logging On

- Open your Internet browser service and use this address:
- http://connexion.oclc.org
- Give your Authorization and Password
- Welcome to the OCLC Connexion Service
- Hello [your name or institution]
- You will be using the service in the NACO Regular mode.

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In the browser mode, anyone with Internet access can find the Connexion login screen without downloading software. The client mode will require software on a server or terminal.

When libraries apply to join PCC and receive NACO training, they request NACO authorizations from OCLC. LC catalogers work in the NACO National mode, but all others have their defaults set for the NACO Regular mode.

Logon at http://connexion.oclc.org

Here's the logon screen.

Here's a feature mentioned by OCLC staff, but not familiar to the Coop folks who created this PowerPoint: If you use Internet Explorer and use its auto-fill feature, you can fill in your authorization number and password the first time you use Connexion, and it will be generated automatically each time you use Connexion.

NACO partners use the service in NACO Regular mode.
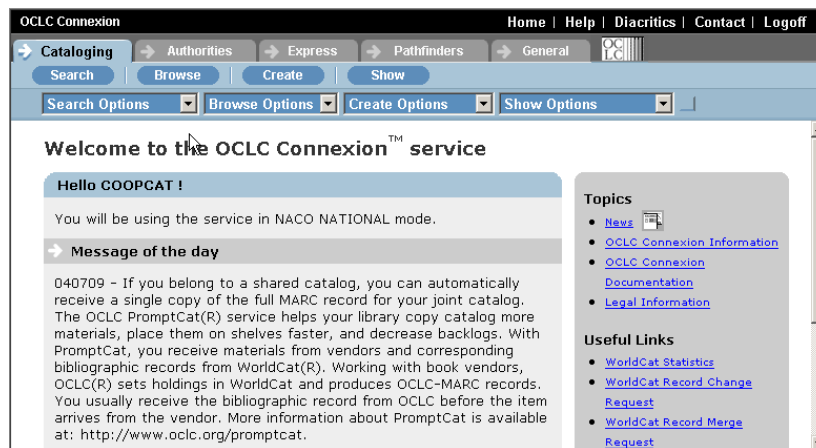
Here's the welcome screen for the generic Coop Team NACO account. Notice the "Hello, CoopCat" and the "NACO National mode"

Notice the tabs across the top:

Cataloging—Authorities—Express—Pathfinders—General.

The lower categories change depending on which tab is active.

On the Cataloging tab, the second line uses Search—Browse—Create—Show

Below them are the same categories with drop-down menus for options.

You need to use the General tab to set some preferences.
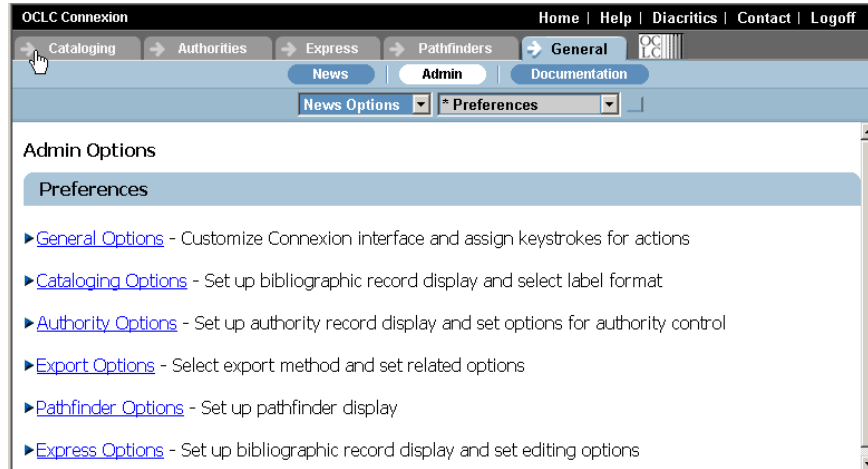
How to Designate Reviewers

- Click on the General tab on the upper right
- Click on Admin
- Under Preferences, click on Authority Options

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You need to designate which institution will review your records.

General—Admin—Preferences—Authority Options

OCLC Connexion　　　　　　　　Home | Help | Diacritics | Contact | Logoff

Cataloging　　Authorities　　Express　　Pathfinders　　General

News　　Admin　　Documentation

News Options ▾　| * Preferences ▾

Admin Options

Preferences

▶General Options - Customize Connexion interface and assign keystrokes for actions

▶Cataloging Options - Set up bibliographic record display and select label format

▶Authority Options - Set up authority record display and set options for authority control

▶Export Options - Select export method and set related options

▶Pathfinder Options - Set up pathfinder display

▶Express Options - Set up bibliographic record display and set editing options

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Notice how the General tab has different categories on the second and third lines.

Authority Options is the place to designate reviewers.

Reviewer Institutions

- On the page that appears, the last Authority Option is "Reviewer Institutions"
- Multiple OCLC institution symbols may be used to designate multiple NACO reviewers
- Click on Save for Session or Save My Default
- "Authority Options have been updated for this session."

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It's rare that a library has more than one reviewer, but it could happen. For example, a library may have its English and Western European languages reviewed by the original trainer, but its non-roman languages reviewed by catalogers at the Library of Congress.

The designated reviewing institutions can be changed at any time as needed.

Type in the OCLC Institution Symbol(s) of the Reviewer(s) and click on "Save My Default"

OCLC Connexion   Home | Help | Diacritics | Contact | Logoff

Cataloging   Authorities   Express   Pathfinders   General   OC LC

News | Admin | Documentation

News Options ▼ * Preferences ▼

⊙ Top ○ Bottom
Record Status - Place at top or bottom of record (Save file records only)
○ Top ⊙ Bottom

Authority Control
⊙ View Authority Information in Lower Frame
○ View Authority Information in Separate Browser Window

Reviewer Institutions
List OCLC symbols for reviewers. Separate symbols with semicolons
(;). DLC; [others?]

Go Back   Save for Session   Save My Default   Reset   Cancel

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It happens that DLC is the code in both the OCLC institution symbol list and the MARC 21 organization code list.

It's possible to list more than one symbol.

Submitting a Record
for Review

- Click the Authorities tab
- Click the Create button below it
- Input data in all appropriate fields
- In the Action box, choose Submit for Review

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After you create a record, there's a drop-down menu to allow it to be submitted for review.

Submit for Review is a choice on the Action menu

Notice that record are created in the Authorities tab.

This template is empty, and the screen shows only the lower portion.

The Action drop-down menu is at the bottom.

Check Record Status

- Records submitted for review remain in the library's Authorities Save File
- Click the Authorities Tab
- Use one of two ways:
  - Search--Save File--Submitted for Review
  - Show Options--By Status--Submitted

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When a library creates an authority record and saves it, it can be reviewed locally by a NACO contact first. Then it can be marked to be submitted to the offsite reviewer, but it stays in the local save file with its new status "Submitted for review".

You can see all the records in the Authority file, and you can sort and display them by status. There are two ways to check which records have been submitted for review.

Search—Save File—Submitted for Review

If you click on Search at the left, this is the result.

Show Options--By Status--Submitted

If you click on Show on the right, this is the result.

Save File

- Authorities Save File shows your own institution's records
  - Access is interactive
- Authorities Review File, below it, allows the designated NACO reviewer to see records sent by another library
  - Access is read-only

When you click on Authorities and then choose Save File, the screen has two different regions.

The upper one is the local save file. You can view records AND change them in your own file.

The lower region gives a reviewer access to view records in another library's save files, if they've set their preferences to allow it. It's read-only access. The reviewer can not change the record or add any messages to it.

Reviewers look in Authorities Review File for records sent by other libraries

Here's the lower portion, the Authorities Review File.

If you leave the Institution box blank, you will retrieve records from all libraries who submitted them to your institution's symbol.

Records submitted to DLC for review

On this day, 11 records were waiting for review by Library of Congress catalogers at the institution symbol DLC.

Numbers on the left show the sequence in which the are being displayed in this group.

The "Save File numbers" are their numbers in the local save file of the institution that submitted the record.

Notice that the 4th record here, BBC Education & Training, "Expires in 82 Days". We'll see this record again.

Notice that you can see two "Owning Institutions", MFM and SEN.

Notes at the Top

- ARN will say NEW, or give number
- Save File [120] is the number from the submitting institution's internal files, because the record still appears there
- Expires in ____days (90 day limit)

The ARN is the number OCLC assigns to authority records.

The LCCN in the 010 is a number LC assigns to authority records.

A new record still in the authority file won't have either until it's contributed.

Top of Record 4; Read-Only format

Notice that the ARN at the top and the LCCN in the 010 are different for this existing record.

The 040 shows that this record originated with the National Library of Medicine, was input by Library of Congress, and has been changed by two other libraries. It's still in the save file of the Singapore Integrated Library Automation Services (SILAS), so it doesn't yet have a $d for the library planning to modify it.

Notes at the Bottom

- Review status   Submitted
- Reviewer institutions   DLC

- These notes appear at the bottom of the record as it's being viewed by a reviewer

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Bottom of Record 4—Note the Review status info at lower edge

The contributing library can enter a 952 in the record, but the reviewer cannot input a 952 or any field.

Searching by Institution

- Start back at the Authorities Review File page
- To search for records by one institution, type its <u>OCLC institution symbol</u> in the Institution box
- That should show all records only from that library

If several libraries are under review by one institution, it's possible to sort their submitted records.

Sorting uses the institution symbol.
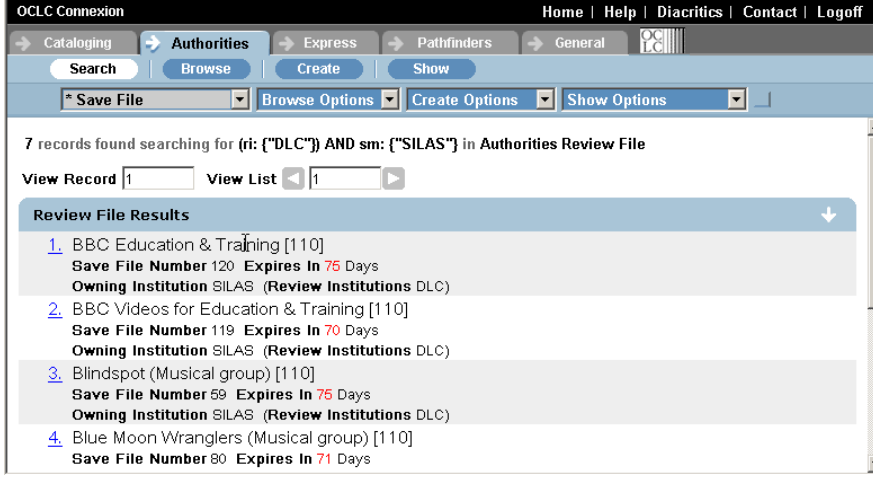
SILAS (OCLC) = Sg-SiILA (MARC)

Type in an institution symbol for one institution and click on Search.

Here's the way to see all the records from the Singapore Integrated Library Automation Services.

Records from Singapore Integrated Lib Automation Services

This shows 7 SILAS records on file on the day this screen was captured.

Remember the record BBC Education & Training? Here it's the first record, because the display is only for SILAS records, not records from all libraries, and it's in alphabetical order.

It "Expires in 75 days". This screen was captured several days after the earlier view of this record, when it still had 82 days before it would expire. We need to get moving on reviewing this record!

When you have viewed all the records you need to see, you can click "Logoff" in the upper right corner.

Read-Only

- All records are Read-Only in Connexion for Reviewers
- *New Feature:* Both contributor and reviewer may view record simultaneously!
- Please use email to exchange comments between contributors and reviewers
- If the record needs to be reviewed again, it must be resubmitted

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Since the record remains in the contributor's own local OCLC save file, only staff from the contributing library may work on the record. A reviewer can look at records marked for submission in another library's save file, but may not input any comments on the record.

Email is the expected medium for most comments from reviewers.

If the record needs discussion, the contributor and reviewer can talk by phone, and both will be able to see the record on the screen at the same time.

Coming to the Client Soon

- The Connexion review functionality described is only in the browser initially
- OCLC plans to include it in the Connexion client version 1.20 later in 2004
- Documentation available at:

http://www.oclc.org/support/documentation

/connexion/browser/

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This new system for NACO review is easier to distribute on the browser than on the client, so it's being developed in phases. As of July 2004, OCLC is planning to expand the NACO functionality to its client later in 2004.

Just as a reminder: Connexion in the browser is available to all via Internet by using an authorization and password; Connexion on a client is software that must be loaded on a local terminal or accessed via a local network, and then entered with authorization and password.

After you logoff, this screen appears, with info about the length of your session, and a place to logon and start again!