



OCLC Cataloging Authorization Levels: Record Actions and Upgrades

Authorization levels and cataloging capabilities

The following list of authorization levels with authorized actions for each is in order from basic levels to highly specialized.

| Authorization level | Connexion client authorized actions | Connexion browser authorized actions |
|---------------------|---|---|
| Search | <ul style="list-style-type: none"> • Search any OCLC database and display retrieved records, including WorldCat, LC names and subjects authority file, LC names and subjects history file, and the Chinese name authority file • Export records • Display holdings • Display, copy and paste, print, or export bibliographic institution records • Report errors in records • Create labels • Print • Edit records locally • Save records to local save file • Search online save file • Create records for local use • Use constant data • Import records | <ul style="list-style-type: none"> • Search any OCLC database and display retrieved records, including WorldCat, LC names and subjects authority file, and the LC names and subjects history file • Export records • Display holdings • Display, copy and paste, print, or export bibliographic institution records • Report errors in records • Create labels • Print • Display local holdings |
| | <p>Notes:</p> <ul style="list-style-type: none"> • Chinese name authority records (available in the client only) and authority history records are read-only. You can copy and paste from the records or print them. You cannot edit or export them. • In some circumstances (for example, you use a Search authorization for Resource Sharing activities), your Search authorization may include additional local holdings capabilities. | |

| Authorization level | Connexion client authorized actions | Connexion browser authorized actions |
|---------------------|---|---|
| Limited | <p>Same actions as for Search plus the following actions:</p> <ul style="list-style-type: none"> • Submit records for review • Lock records • Save records to online save file • Delete records from online save file • Validate records • Control headings <p>Note on maintaining local holdings: Although local holdings maintenance is available only in the browser, you can open the browser local holdings interface and automatically log on from within the client: Click Tools > Launch Local Holdings Maintenance.</p> | <p>Same actions as for Search plus the following actions:</p> <ul style="list-style-type: none"> • Edit records locally • Create records for local use • Use constant data • Import records • Submit records for review • Lock records • Save records to online save file • Search online save file • Delete records from online save file • Validate records • Control headings • Create and add, edit and replace, or delete local holdings |
| | <p>Note on the online save file: Each library has a single online save file associated with its authorization, which you can access using either the client or the browser interface.</p> | |

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| Authorization level | Connexion client and browser authorized actions |
|---------------------|---|
| Full | <p>Same actions as for Limited plus the following actions:</p> <ul style="list-style-type: none"> • Set and delete holdings on bibliographic records • Replace master bibliographic records in WorldCat <p>Note: See section below for more about types of master record upgrades you can make.</p> <ul style="list-style-type: none"> • Add new bibliographic records to WorldCat • Create and add, edit and replace, or delete your library's bibliographic institution records (IRs) (if your logon authorization includes IRs) |

Specialized authorization levels:

| Authorization level | Connexion client and browser authorized actions |
|---|--|
| NACO (Name Authority Cooperative program) | <p>Same actions as for Full plus the following actions:</p> <ul style="list-style-type: none"> • Replace name authority records in the LC authority file • Add new name authority records to the LC authority file |
| Agent | <p>Same actions as for Full plus the following actions:</p> <ul style="list-style-type: none"> • Set and delete holdings on bibliographic records on behalf of other libraries for whom the agent is providing cataloging • Maintain local holdings on behalf of other libraries |
| Regular Enhance | <p>Same actions as for Full</p> <p>Used by Enhance participants to enhance non-national, non-PCC (Program for Cooperative Cataloging) master bibliographic records in authorized formats, except records for serials</p> |
| Enhance National | <p>Same actions as for NACO</p> <p>Used by Enhance participants to enhance national and PCC master bibliographic records in authorized formats, except records for serials</p> |
| Regular CONSER (Cooperative Online Serials program) | <p>Same actions as for Full</p> <p>Used by CONSER participants to authenticate and maintain master continuing resource records</p> |
| CONSER National | <p>Same actions as for NACO</p> <p>Used by CONSER participants to authenticate and maintain master continuing resource records</p> |

Notes:

- See more about the Program for Cooperative Cataloging (PCC), including NACO and CONSER, on the Library of Congress Web site at <http://www.loc.gov/catdir/pcc/>.
- This table does not cover the CatExpress Web-only interface for copy cataloging. CatExpress authorizations do not have different levels. For more CatExpress information, see the *CatExpress User Guide* at <http://www.oclc.org/support/documentation/catexpress/using/guide/1introduction/chap1.htm#cx-overview>.

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Definitions of master record upgrades versus records with local edits

| Edit mode | Definitions and notes |
|--|---|
| Master bibliographic or name authority record (locked or unlocked) | <ul style="list-style-type: none"> A master record is the version of the record available to all who have access to Connexion. It does not include local data for any library. To replace a master record, it must be locked in WorldCat or the LC authority file: <ul style="list-style-type: none"> — Connexion client: With a WorldCat or save file record open, click Action > Lock Master Record. Edit the record and replace it (Action > Replace Record). Or Edit the record locally (while it is unlocked), and when you replace it, let the system lock the record automatically before completing Replace. Note: If another user has already locked or replaced the record after you opened or saved it, your replace action fails and you get an error message. — Connexion browser: With a save file record open, click the Action list and then click Lock Master Record. Edit the record and replace it (in the Action list, click Replace Record). When you lock a record (or the client locks it before replacing it), no other user can access the master record until you unlock it or the Replace is completed. Other users can retrieve the record or edit it locally while the master record is locked. |
| Locally edited bibliographic or authority record | <ul style="list-style-type: none"> A locally edited record is a copy of the master record that you can modify for your particular library needs, and then export to your local system, without affecting the master record. Any time you edit a record without locking or replacing it, you are making local edits. Other users can retrieve the record, edit it locally, or lock and edit the master record. You are using local editing when you do copy cataloging. |

Summary: Authorization levels and editing master records versus making local edits

| Record level/ authorization level | Connexion client: Editing/actions authorized | Connexion browser: Editing/actions authorized | Records/modifications authorized |
|--|---|--|---|
| Unlocked (local) record/ Search or higher | Edit records locally Save to local save file Export | Display record Export | Applies to any record in WorldCat or the LC authority file. Client only: Make any modifications for local use. |
| Unlocked (local) record/ Limited or higher | Lock, edit, and save record to local or online save file Export | Lock, edit, and save record to online save file Export | Applies to any record in WorldCat or the LC authority file. Client or browser: Make any modifications for local use. |
| Locked (master) record/Full, NACO, or higher | Lock (optional*), edit, and save (optional**) record Replace master record Export *If you do not lock, the client automatically locks upon Replace; edits are local until record is locked. **No requirement to save record before Replace. | Lock, edit, and save record Replace master record Export | <ul style="list-style-type: none"> Records your library contributed. Minimal-level records you are upgrading. Records you are enriching (adding call numbers, contents notes, subject headings, non-Latin script data, etc.). For details, see the next section. |

Types of master record upgrades for Full, Enhance, and CONSER authorizations

The following table describes upgrade types, what upgrades they include, and minimum authorizations required:

| Upgrade type | Description | Authorization required |
|--|---|---|
| Minimal-level upgrade | <ul style="list-style-type: none"> • Add and modify all editable fields of less-than-full-level records (Encoding Levels: K, M, 2, 3, 4, 5, and 7) to upgrade them to full-level (Encoding Level I) or less-than-full (Encoding Level K) • Add a call number or subject heading(s) if the call number or subject heading scheme is not already in the record • For Encoding Level 4, cannot add or modify editable fields of PCC (Program for Cooperative Cataloging) records (field 042 contains <i>pcc</i>) • Cannot add or modify editable fields of CONSER-authenticated continuing resource records (field 042 contains a CONSER authentication code) | <ul style="list-style-type: none"> • Full • Enhance • CONSER |
| Database Enrichment Tip: Make all database enrichments in one editing session in case your authorization level will not permit you to replace the record a second time after you upgrade it. | <ul style="list-style-type: none"> • Add or edit: <ul style="list-style-type: none"> — Call numbers — Subject headings and class number if headings and classification scheme are not already in the record — Field 300 in CIP (cataloging in progress) records — Non-Latin script data in MARC 880 fields — Field 5XX (X = any number) (can add only if field is not already present) — Field 856 (can add only if field is not already present) • Add or modify editable fields of full-level serial records that have 10 or fewer holdings • Cannot modify CONSER-authenticated continuing resource records (field 042 contains a CONSER authentication code) <p>Note: You do not receive a database enrichment credit when you only control headings and replace the master record.</p> | <ul style="list-style-type: none"> • Full • Enhance • CONSER |
| Enhance (Regular & National) | <ul style="list-style-type: none"> • Add data or edit all non-serial records <ul style="list-style-type: none"> — Regular: All encoding levels except blank, 1, and 4 in records with <i>pcc</i> in field 042 — National: All encoding levels • Add data or edit nonprint serial records not authenticated by CONSER <p>Notes:</p> <ul style="list-style-type: none"> • Your library must be authorized for the formats. • Your library may be authorized to enhance more than one format. • For information on the Enhance program, see <i>OCLC Bibliographic Formats and Standards</i>, chapter 5, "Quality Assurance," at http://www.oclc.org/bibformats/quality/. This chapter includes many links to Library of Congress participation requirements, instructions, and more on the LC Web site. | <ul style="list-style-type: none"> • Enhance |
| CONSER (Regular & National) | <ul style="list-style-type: none"> • Add data or edit all print and nonprint continuing resource records. • For information on the CONSER program, see <i>OCLC Bibliographic Formats and Standards</i>, chapter 5, "Quality Assurance" (see URL above). | <ul style="list-style-type: none"> • CONSER |