

Edit Authority Records

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Revision History

Date	Section title	Description of changes
May 2007	4. Validate record	Revised to document change in default validation level from None to Structure.
June 2008	5. Add non-Latin headings	New section added to document the ability to add non-Latin script data to selected 4xx, 6xx, and 7xx fields in authority records.
February 2012	9. Print records; 10. Editing keystrokes	Removed "DDC" from "Control All" command; Connexion no longer controls DDC numbers.
September 2012	All	Removed references to Pathfinder.
May 2014	All	Updated text on how to open the diacritics window. Shortcut key no longer available.
June 2021	All	Replaced references to "master records" with "WorldCat records."

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1 Edit authority records: basics

Editing privileges for name authority records

- Specific editing capabilities depend on your authorization level.
- A Search authorization permits no record creation or editing.
- A Limited or Full authorization permits you to create records, save records, export records, edit records locally, and lock, edit, and save WorldCat name authority records.
- NACO authorizations (NACO Regular, NACO National, and Enhance National) allow you to add new name authority records to the Authority File and to edit and replace WorldCat name authority records.

Editing privileges for subject authority records

- A Search authorization permits no editing.
- A Limited or higher authorization permits you to take the following actions on subject authority records:
 - Edit records locally
 - Validate records
 - Save records
 - Export records
 - Add records to the Authority Constant Data Database
 - Use records as default constant data
 - Flag or unflag records
- The following actions are not available for subject authority records:
 - Edit WorldCat records (or replace WorldCat records)
 - Derive records
 - Create records from workforms
 - Add new records to the Authority File
 - Create new (blank) constant data records

Edit modes, display mode, and record views

Mode	When in Effect	Record Views
Display mode	When you select Display Record from the Edit list. After you end edit mode by canceling changes or saving the record.	MARC display view (MARC Template or MARC Text Area selected)
WorldCat edit mode (Lock WorldCat Record) Not available for subject authority record	When you take the Lock WorldCat Record action. When you retrieve a locked WorldCat record from the savefile.	Edit views: MARC Template MARC Text Area Display view (select Display Record while in edit mode): MARC display view (MARC Template or MARC Text Area selected)

Mode	When in Effect	Record Views
Edit mode (Edit Record)	Default mode for new record just created (derived, from workform, or generated from a name heading). When you take the Edit Record action. When you click the entry number to begin editing a record listed in search results.	Edit views: MARC Template MARC Text Area Display view (select Display Record while in edit mode): MARC display view (MARC Template or MARC Text Area selected)

**Edit WorldCat record
redit record locally**

Edit mode	Definition
WorldCat record	A WorldCat record is the version of the record available to all users. When you begin editing a WorldCat authority record, the record is locked in the Authority File. Other users can retrieve the record in display mode or edit it locally while you have the WorldCat record locked for editing.
Locally edited record	A locally edited record is a copy of the WorldCat authority record that you can modify without affecting the WorldCat record. While editing a record locally, you can add, delete, or change the record content to meet your library's needs and then export the record. The record is not locked in the Authority File; other users can retrieve it in display mode, edit it locally, or lock and edit the corresponding WorldCat record. You can edit a record locally regardless of whether another user has locked the WorldCat record.

Edit modes: Functions compared

Edit mode	Authorization level	Records / Modifications
WorldCat (Lock WorldCat Record) Not available for subject authority record	Limited or higher: Lock, edit, and save WorldCat record NACO only: Replace WorldCat record NACO only: Add new WorldCat record	Any record in the Authority File. Any record in the Authority File. Modification required to produce complete and accurate authority record. Record for heading not represented in the Authority File.
Edit (Edit Record)	Limited or higher: Edit, save, and export record.	Any record in the Authority File. Any modification for local use.

Switch edit modes

- **From editing WorldCat record to editing record locally.** On the Action list, click **Release Record Lock**. The lock on the record is released, but no changes are made to the record content. You can save or export the record with changes made so far.
- **From editing a record locally to editing the WorldCat record.** On the Action list, click **Lock WorldCat Record**. The system locks the record. If the record is already locked by another user, the system displays a message to inform you and takes no action. When the record is locked, all edits made in local edit mode are lost.
- **Preserve local edits.** To preserve edits made in local edit mode for use in modifying the WorldCat record, switch to a text area edit view, select the text you want, and copy it to the clipboard (on the browser's edit menu, click **Copy**; or press <Ctrl><C>). Then take the **Lock WorldCat Record** action. In the locked WorldCat record, paste the copied data (on the browser's edit menu, click **Paste**; or press <Ctrl><V>).

About the Authority History database

- If you retrieved this record from the Authority History database, please note the following points about the purpose of this database and the limited functionality available for using the records.
- The Authority History database permanently stores:
 - All previous, now superseded, versions of authority records distributed by the Library of Congress
 - Versions of newly added and modified records distributed to Library of Congress by OCLC NACO participants
 - Copies of current authority records sent from LC via the distribution cycle (includes all records in the Authority File)
 - Name authority records deleted by OCLC quality control staff
- Database coverage begins in the 1980's.
- Records are stored and displayed in the MARC21 authorities format.

About authority history records

- Authority history records are view-only and always appear in display mode in the MARC Template view.
- A timestamp at the top of the record shows the date and time when the record was added to the Authority History database. (Records in the Authority File do not contain a timestamp.)
- You cannot edit, save, export, or derive new authority records from these records. You can copy text from an authority history record and then paste it into another record or document.
- Actions available on displayed authority history records are: Print Record and View Authority Record (to retrieve the current version of the record in distribution from the Authority File).

- **More?** For more information, search Help for the words **authority history**.
- Use authority history records:
 - Trace the history of a currently distributed authority record or an LCCN. For example, you might want to know when changes were made, or when a cross-reference or citation was added. Or you want to check the cancelled authority record when the distributed record contains a subfield **z** in field 010.
 - Check for headings that you can no longer find in a distributed record in the Authority File.
 - Identify changes made to a distributed authority record.
 - Determine the origin of a problem with a distributed record.

Authority History timestamp: details

A unique timestamp (labeled **Timestamp**) appears in the record identification area of an Authority History record.

- The system assigns a unique timestamp to each Authority History record. The timestamp consists of: the date and time the record was added to the Authority History database, the OCLC ARN, a source program identification, and the status of the record.
- **Example: 1990101** [yyyymmdd] **13.36.22xxx.Z** [time to the millisecond Z = Greenwich Mean Time] **12345678** [OCLC ARN] **S** [status] **C** [source program identification]
- **S** [status (RecStat code)]: **n** = new, **c** = changed, **d** = deleted, **p** = deleted by OCLC staff
- **S** [source program ID]: **3** [initial database load from the LC Names and Subjects Authority File]; **4** [In Distribution update from Connexion client]; **5** [In Distribution update from Connexion browser]; **6** [loaded from the LC distribution file]; **r** [loaded from the Research Libraries Group authority history database]

Note: Deleted records. If applicable, the record identification area may contain the following notice about the record:

The **Deleted Record** notice indicates that the record has been deleted from the distributed Authority File. It is either a deleted record issued by the Library of Congress or a record manually deleted by OCLC Quality Control staff.

Open authority history record(s) from distributed authority record

When viewing a distributed authority record from the Authority File, you can quickly retrieve all superseded authority records that have the same OCLC ARN.

Notes on this function:

Not available from save file records. When viewing a saved authority record from the Authorities save file, the **View Authority History Record(s)** action is not available

Copy of distributed record retrieved. The Authority History database contains a copy of each distributed authority record. Therefore, your search always retrieves the same record that you were viewing from the Authority File. You may retrieve other superseded records, or only a copy of the distributed record.

Viewing a referenced record via a linked 5xx field. A referenced record viewed from a 5xx link is for display only; the **View Authority History Record(s)** action is

not available. To retrieve superseded versions of the record, search for the Authority File or the Authority History database.

Action	Result
In the distributed authority record (retrieved from the Authority File), On the Action list click View Authority History Record(s) or press <Alt><K> and then <H> (or <Alt><J> and then <H>)..	The system searches for the distributed record's ARN in the Authority History database. If the search retrieves one record (a copy of the distributed authority record), the record appears in a separate window. If the search retrieves multiple records, a search results list appears in a separate window. The first record in the results list is typically a copy of the distributed authority record.

Open a distributed authority record from an authority history record

When viewing a superseded authority record (retrieved by searching or browsing the Authority History database), you can quickly retrieve the distributed authority record that has the same OCLC ARN.

Action	Result
In the authority history record (retrieved by searching or browsing the Authority History database), On the View list click View Authority Record or press <Alt><K> and then <A> (or <Alt><J> and then <A>)..	The system searches for the superseded record's ARN in the Authority File. If the search retrieves a record, the record appears in a separate window. If the distributed record has been deleted from the Authority File, you receive a message stating that no record was found. The message includes the number of authority history records available for that ARN.

Caution: Store edits on server before moving to another screen

- If you edit **fields** in an authority record without interacting with the server, and then move to another screen (for example, to search WorldCat or the Authority File, or view flagged records), you **lose all changes** made since the last server interaction. When you resume editing, the system redisplay the working copy of the record **as it exists on the server**, not necessarily as it last appeared on your screen.

- Changes to the text of record fields are **not sent to the server** until you use the Action list (to reformat, validate, save, etc.), the View list (to switch to another edit view or display view), or the Functions list (for field-level actions). These actions send a request to the server, along with the displayed record content. The server responds by taking the requested action and then redisplaying the updated record.
- As a precaution when editing, **occasionally reformat** the record to make sure that your changes are stored on the server.
- **Note: Inactivity timeout.** As an added benefit, occasional interaction with the server prevents the system's **inactivity timer** from ending your session. Only server interactions count as session activity.

WorldCat record locked for editing

- When you begin editing a **WorldCat** record, it is locked. WorldCat authority records are locked in the Authority File.
- Other users can view the record but cannot change it until you release the lock.
- To **unlock** the record, **release** the lock, **cancel changes** or **replace** the WorldCat record.
- To place a long-term lock (14 days) on the record, **save** it while it is locked.

In Distribution notice: record temporarily locked

If applicable, the record identification area may contain the following information about a record in the Authority File:

In Distribution This notice indicates that the record is newly added or modified by an OCLC NACO participant and is still in the NACO distribution cycle. The record is locked until officially distributed by the Library of Congress. Typical cycle time is 3 days).

Logoff warning for edited records

- When you click **Logoff** to end a session, the system checks for records in edit mode, including locked WorldCat records and new records not saved or added to the Authority File.
- The system displays a message to remind you to save the records or complete editing and take a final action before logging off.
- To complete your work on the record(s), on the message screen click **Show Active Records** or press <Ctrl><Shift><9>. Or, on the Authorities tab, under Show, click **Active Records** or press <Alt><4>. At the Active Records screen, under Authority Records or Authority Save File, click the link for the record you were editing. For each active record, the link shows the main entry and either an OCLC Authority Record Control Number (ARN) or an authority save file number. If the record contains no main entry, **No Main Entry Provided** appears in the link. For a new authority record (not yet saved or added to the Authority File), the link shows only the main entry or **No Main Entry Provided**.
- To log off and discard unsaved changes to the record(s), on the message screen click **Logoff immediately**.
- **Turn off logoff warning for active records**

If you prefer **not** to be notified about active records before logging off, use the **Show or Hide Logoff Warning** option to prevent the system from displaying this warning. To view or change the setting, do one of the following:

- From the End Your Session screen (the logoff warning), go directly to the Interface Customization Options screen by clicking **Customize your setting**.
- Or
- On the General tab, click **Admin**. On the Preferences screen, click **General Options**. Then click **Interface Customization Options**. On the Interface Customization Options screen, find the **Show or Hide Logoff Warning** option and select **Hide**.

Authority record edit views

View	Description
MARC Template	<p>Template view for editing in Machine-Readable Cataloging (MARC) format. Compliant with MARC21. MARC21 fields may be supplemented with additional fields defined in OCLC-MARC.</p> <p>Field content entered in text boxes.</p> <p>Provides Functions list for adding/removing elements.</p> <p>Input guidelines available for variable fields via Help on Functions list.</p> <p>Templates simplify entering fixed field (008). Help buttons provide input guidelines for 008. Elements in fixed-length fields linked to specific guidelines.</p> <p>MARC display view of the record is the same for either MARC edit view.</p>
MARC Text Area	<p>Text area view for editing MARC-format record.</p> <p>All variable fields appear in a single large text box.</p> <p>Lets users edit efficiently by reducing interactions with the server.</p> <p>Templates simplify entering fixed field (008). Help buttons provide input guidelines for 008, but not for other fields.</p> <p>Elements in fixed-length fields linked to specific guidelines.</p> <p>MARC display view of the record is the same for either MARC edit view.</p>

Authority record display view

View	Description
MARC	<p>View for displaying records in Machine-Readable Cataloging (MARC) format. Compliant with MARC 21. MARC 21 fields may be supplemented with additional fields defined in OCLC-MARC.</p> <p>Input guidelines available for variable fields via hyperlinked field tags. Help buttons provide input guidelines for 008.</p> <p>Elements in fixed-length fields linked to specific guidelines.</p> <p>MARC display view is the same whether you select MARC Template or MARC Text Area from the View list.</p>

Related topics

2 Edit authority record: MARC Template edit view

Fields restricted for editing

You cannot edit the following fields in an existing authority record. If you try to change these fields, Connexion validation will reject the record.

- Leader byte 5 (Rec Stat)
- Leader byte 6 (Type)
- 008 field positions 0-5 (Entered)
- 001 field (ARN)
- 005 field
- 010 field (LCCN)
- 035 field
- 040 field cannot be changed except to add \$b eng)

Keystroke shortcuts for editing

To do this	Press
Move cursor between the first fixed-field element and the first variable fields.	<Alt></> (slash)
Move to the top or bottom of the record screen.	<Ctrl><Home> to move to the first input box on the screen. <Ctrl><End> to move to the last input box on the screen.
Show or hide the Functions list	<Alt><Y>
Go to the Active Records screen	<Ctrl><Shift><9>

Edit in MARC template view

Technique	How to
Change text	In the text box for the field, use standard editing keys (<Insert>, <Backspace>, <Delete>, arrow keys) to move the insertion point and remove or add characters.
Delete text	In the Functions list click Delete Text . The system removes the text of the field; tag and indicators remain. Empty fields removed The empty field is removed if you reformat the record or take a final action.

Technique	How to
<p>Undo text changes <Ctrl><Z></p>	<p>To reverse the most recent text change, use the standard Windows undo keystroke: <Ctrl><Z>.</p> <p>The following functions are supported in recent browser versions. Specific functionality may change with browser upgrades. Check browser Help or documentation for details.</p> <p>Undo last change, current text box: Press <Ctrl><Z> once.</p> <p>Undo series of changes, current text box: Press <Ctrl><Z> once to reverse each change, beginning with the last.</p> <p>Undo series of changes in different text boxes: Place the insertion point in the desired text box and then press <Ctrl><Z>.</p> <p>Begin with the text box most recently modified and return to the other text boxes in reverse order (retrace your steps).</p> <p>Notes on browser-based Undo Browser dependent. Support for <Ctrl><Z> varies with browser name and version. Refresh clears undo memory. If you take an action that refreshes the screen (for example, click an item on one of the tabs, the Action list, or the Functions list for a field), the undo memory is cleared.</p>
<p>Enter diacritics and special characters Character chart window Internet Explorer for Windows only</p>	<ol style="list-style-type: none"> 1. Place the cursor where you want to insert a diacritic or special character. 2. From the Edit menu, select Enter Diacritics. 3. In the Enter Diacritics and Special Characters window, click a character or diacritic to insert it at the cursor position. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. <p>Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol.</p> <p>(Note: Windows only. Not supported by Macintosh versions of IE.)</p>

Technique	How to
Enter diacritics and special characters Bar syntax (mnemonic codes)	<p>Enter diacritics and special characters using mnemonic codes.</p> <p>Diacritics.</p> <ol style="list-style-type: none"> 1. Type the code for a diacritic after the letter it modifies (Unicode syntax). 2. First type the letter modified by the diacritic. 3. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 4. Then type the mnemonic for the diacritic. 5. Then type another vertical bar symbol. Do not type a space between the letter and the code for the diacritic. <p>Example: To enter an e with an acute accent, type e ac </p> <p>Special characters.</p> <ol style="list-style-type: none"> 1. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 2. Type the mnemonic for the diacritic. 3. Then type another vertical bar symbol. <p>Note: appearance in edit mode</p> <ul style="list-style-type: none"> • Characters entered using this method are automatically replaced with typographic forms. • If you prefer, you can set an option to view the bar syntax in edit mode.
Table of ALA-defined diacritics and special characters	<ul style="list-style-type: none"> • On the header bar (black bar at the top of every system screen), click Diacritics. <p>Use the table to identify a character, find a character by name, or copy a character for input in a record.</p>
Add single field	<p>Move to the field above the place where you want to add a field.</p> <p>In the Functions list click Add Single Field Below.</p> <p>The inserted field duplicates the MARC tag of the preceding field.</p> <p>In the added field, change the tag and supply indicators as appropriate.</p>
Add multiple fields	<p>Move to the field above the place where you want to add fields.</p> <p>In the Functions list click Add Multiple Fields.</p> <p>In the dialog box, type the number of fields you want to add (1 through 10). Then click OK.</p> <p>The inserted fields duplicate the MARC tag of the preceding field.</p> <p>In the added fields, change the tags and supply indicators as appropriate.</p>
Delete field	<p>In the Functions list click Delete Field.</p>
Copy field	<p>Move to the field you want to copy.</p> <p>In the Functions list click Copy Field.</p> <p>Move to the field above the place where you want to insert the copied field.</p> <p>In the Functions list click Paste Field.</p>

Technique	How to
Move field (Cut and Paste)	Scroll to the field you want to reposition. In the Functions list click Cut Field . Scroll to the field above the place where you want to insert the moved field. In the Functions list click Paste Field .
View field-specific input guidelines	Current field On the Functions list for the field, click Help . Any variable field (tag) or fixed field element In the MARC Help text box (right side, record header), type the tag number or the element label. Click the MARC Help button. Fixed field or field 006 For the fixed field or field 006, click an element label for help on the specific element. Or type the element label in the MARC Help text box and then click MARC Help .
Add a subfield and subfield delimiter	1. Enter a subfield delimiter (‡): <ul style="list-style-type: none"> Type a single dollar sign (\$). Press <Shift><4> to create the \$. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode. 2. Type the appropriate lowercase letter and (optionally) 1 space. Then type the text of the subfield. 3. (Optional) Type a space before any subsequent subfield delimiter.
Enter a dollar sign as a currency symbol	To enter a dollar sign as a currency symbol (not to represent a subfield delimiter): Type 2 dollar signs (\$\$). Do not type a space between the 2 dollar signs.

About the Authority History database

- If you retrieved this record from the Authority History database, please note the following points about the purpose of this database and the limited functionality available for using the records.
- The Authority History database permanently stores:
 - All previous, now superseded, versions of authority records distributed by the Library of Congress
 - Versions of newly added and modified records distributed to Library of Congress by OCLC NACO participants
 - Copies of current authority records sent from LC via the distribution cycle (includes all records in the Authority File)
 - Name authority records deleted by OCLC quality control staff
- Database coverage begins in the 1980's.
- Records are stored and displayed in the MARC21 authorities format.

About authority history records

- Authority history records are view-only and always appear in display mode in the MARC Template view.

- A timestamp at the top of the record shows the date and time when the record was added to the Authority History database. (Records in the Authority File do not contain a timestamp.)
- You cannot edit, save, export, or derive new authority records from these records. You can copy text from an authority history record and then paste it into another record or document.
- Actions available on displayed authority history records are: Print Record and View Authority Record (to retrieve the current version of the record in distribution from the Authority File).
- **More?** For more information, search Help for the words **authority history**.
- Use authority history records:
 - Trace the history of a currently distributed authority record or an LCCN. For example, you might want to know when changes were made, or when a cross-reference or citation was added. Or you want to check the cancelled authority record when the distributed record contains a subfield **z** in field 010.
 - Check for headings that you can no longer find in a distributed record in the Authority File.
 - Identify changes made to a distributed authority record.
 - Determine the origin of a problem with a distributed record.

**LCCN format details
(field 010)**

The format for the Library of Congress Control Number (LCCN) includes the following segments:

- Two or four year characters represent the year the record was created in machine-readable format
- Serial number of one to six digits
- Prefixes (n, nb, no, nr, ns, sh, sj)

The table provides details on data formatting for both pre-2001 LCCNs (2-digit year) and current LCCNs (4-digit year).

LCCN segment	Pre-2001 LCCN Length and position of segment	2001 and later LCCN Length and position of segment
Alphabetic prefix	Up to 3 letters Positions 1 through 3 1 to 3 leading blanks fill unoccupied positions Note: Prefix with 1 or 2 letters appears with letter(s) left-justified.	1 or 2 letters Positions 1 and 2 1 or 2 leading blanks fill unoccupied positions Note: Prefix with 1 letter appears with letter left-justified.
Year	2 digits Positions 4 and 5	4 digits Positions 3 through 6

Edit Authority Records

LCCN segment	Pre-2001 LCCN Length and position of segment	2001 and later LCCN Length and position of segment
Serial number	1 to 6 digits Positions 6 through 11 1-5 leading zeros fill unoccupied positions	1 to 6 digits Positions 7 through 12 1-5 leading zeros fill unoccupied positions
Supplement blank	1 blank after last digit of serial number Position 12	Not needed
Examples	Name authority records n 79063767 no 95015107 nr 00013605 Subject authority records sh 85010297 sh 99001533 Children's subject authority record sj 96006123	Name authority records nr2005026233 no2008131725 n 2008000884 Subject authority record sh2001000183 Children's subject authority record sj2004004943

3 Edit authority record: MARC Text Area edit view

Fields restricted for editing

You cannot edit the following fields in an existing authority record. If you try to change these fields, Connexion validation will reject the record.

- Leader byte 5 (Rec Stat)
- Leader byte 6 (Type)
- 008 field positions 0-5 (Entered)
- 001 field (ARN)
- 005 field
- 010 field (LCCN)
- 035 field
- 040 field cannot be changed except to add \$b eng)

Keystroke shortcuts for editing

To do this	Press
Move cursor between the first fixed-field element and the first variable fields.	<Alt></> (slash)
Move to the top or bottom of the record screen.	<Ctrl><Home> to move to the first input box on the screen. <Ctrl><End> to move to the last input box on the screen.
Go to the Active Records screen	<Ctrl><Shift><9>

Edit in MARC Text Area view

Technique	How to
Change text	In the text area, use standard editing keys (<Insert>, <Backspace>, <Delete>, arrow keys) to move the insertion point and remove/add characters.
Delete text	Press <Backspace> or <Delete> to delete text. Or Select the text. In the browser's menu bar, open the Edit menu and click Cut . Or right-click the selected text; on the popup menu click Cut . Empty fields removed The empty field is removed if you reformat the record or take a final action.

Technique	How to
<p>Undo text changes <Ctrl><Z></p>	<p>To reverse the most recent text change, use the standard Windows undo keystroke: <Ctrl><Z>.</p> <p>The following functions are supported in recent browser versions. Specific functionality may change with browser upgrades. Check browser Help or documentation for details.</p> <p>Undo last change, current text box: Press <Ctrl><Z> once.</p> <p>Undo series of changes, current text box: Press <Ctrl><Z> once to reverse each change, beginning with the last.</p> <p>Undo series of changes in different text boxes: Place the insertion point in the desired text box and then press <Ctrl><Z>.</p> <p>Begin with the text box most recently modified and return to the other text boxes in reverse order (retrace your steps).</p> <p>Notes on browser-based Undo Browser dependent. Support for <Ctrl><Z> varies with browser name and version. Refresh clears undo memory. If you take an action that refreshes the screen (for example, click an item on one of the tabs, the Action list, or the Functions list for a field), the undo memory is cleared.</p>
<p>Enter diacritics and special characters Character chart window Internet Explorer for Windows only</p>	<ol style="list-style-type: none"> 1. Place the cursor where you want to insert a diacritic or special character. 2. From the Edit menu, select Enter Diacritics. 3. In the Enter Diacritics and Special Characters window, click a character or diacritic to insert it at the cursor position. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. <p>Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol.</p> <p>(Note: Windows only. Not supported by Macintosh versions of IE.)</p>

Technique	How to
Enter diacritics and special characters Bar syntax (mnemonic codes)	<p>Enter diacritics and special characters using mnemonic codes.</p> <p>Diacritics.</p> <ol style="list-style-type: none"> 1. Type the code for a diacritic after the letter it modifies (Unicode syntax). 2. First type the letter modified by the diacritic. 3. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 4. Then type the mnemonic for the diacritic. 5. Then type another vertical bar symbol. Do not type a space between the letter and the code for the diacritic. <p>Example: To enter an e with an acute accent, type e ac </p> <p>Special characters.</p> <ol style="list-style-type: none"> 1. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 2. Type the mnemonic for the diacritic. 3. Then type another vertical bar symbol. <p>Note: appearance in edit mode</p> <ul style="list-style-type: none"> • Characters entered using this method are automatically replaced with typographic forms. • If you prefer, you can set an option to view the bar syntax in edit mode.
Table of ALA-defined diacritics and special characters	<ul style="list-style-type: none"> • On the header bar (black bar at the top of every system screen), click Diacritics. <p>Use the table to identify a character, find a character by name, or copy a character for input in a record.</p>

Technique	How to
Add single field	<p>Move the insertion point to the end of the line above the place where you want to add a field.</p> <p>Press <Enter> to create a blank line and supply a right angle bracket (>). (Note: Angle bracket (>) supplied if using Internet Explorer browser; functionality not supported by Netscape browser.)</p> <p>Or</p> <p>Move the insertion point to the beginning of the line below the place where you want to add a field. Press <Enter> to create a blank line.</p> <p>Type a right angle bracket, the 3-digit tag, a space, indicator 1 (or a space), indicator 2 (or a space), a space, and then the text of the field.</p> <p>Do not type a space between the > and the first digit of the tag.</p>
Add multiple fields	<p>Repeat the steps for adding one field.</p> <p>Or</p> <p>Select the text of a field you want to duplicate.</p> <p>In the browser's menu bar, open the Edit menu and click Copy.</p> <p>Move to the place where you want to insert another field.</p> <p>On the browser's Edit menu, click Paste. Repeat pasting the copied field if desired.</p>
Delete field	<p>Press <Backspace> or <Delete> to delete single characters.</p> <p>Or</p> <p>Select the text of the field. In the browser's menu bar, open the Edit menu and click Cut.</p> <p>Or right-click the selected text; on the popup menu click Cut.</p>
Copy field	<p>Move to the field you want to copy.</p> <p>Select the text of the field.</p> <p>On the browser's Edit menu, click Copy. Or right-click the selected text; on the popup menu click Copy.</p> <p>Move to the field above the place where you want to insert the copied field.</p> <p>On the browser's Edit menu, click Paste. Or right-click at the desired position; on the popup menu click Paste.</p>
Move field (Cut and Paste)	<p>Scroll to the field you want to reposition.</p> <p>Select the text of the field.</p> <p>On the browser's Edit menu, click Cut. Or right-click the selected text; on the popup menu click Cut.</p> <p>Move to the field above the place where you want to insert the moved field.</p> <p>On the browser's Edit menu, click Paste. Or right-click at the desired position; on the popup menu click Paste.</p>

Technique	How to
View field-specific input guidelines	<p>Fixed field Click an element label for help on the specific element.</p> <p>Any variable field (tag) or fixed field element In the MARC Help text box (right side, record header), type the tag number or the element label. Click the MARC Help button.</p>
Add a subfield and subfield delimiter	<p>1. Enter a subfield delimiter (‡):</p> <ul style="list-style-type: none"> • Type a single dollar sign (\$). Press <Shift><4> to create the \$. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode. <p>2. Type the appropriate lowercase letter and (optionally) 1 space. Then type the text of the subfield.</p> <p>3. (Optional) Type a space before any subsequent subfield delimiter.</p>
Enter a dollar sign as a currency symbol	<p>To enter a dollar sign as a currency symbol (not to represent a subfield delimiter): Type 2 dollar signs (\$\$). Do not type a space between the 2 dollar signs.</p>

About the Authority History database

- If you retrieved this record from the Authority History database, please note the following points about the purpose of this database and the limited functionality available for using the records.
- The Authority History database permanently stores:
 - All previous, now superseded, versions of authority records distributed by the Library of Congress
 - Versions of newly added and modified records distributed to Library of Congress by OCLC NACO participants
 - Copies of current authority records sent from LC via the distribution cycle (includes all records in the Authority File)
 - Name authority records deleted by OCLC quality control staff
- Database coverage begins in the 1980's.
- Records are stored and displayed in the MARC21 authorities format.

About authority history records

- Authority history records are view-only and always appear in display mode in the MARC Template view.

- A timestamp at the top of the record shows the date and time when the record was added to the Authority History database. (Records in the Authority File do not contain a timestamp.)
- You cannot edit, save, export, or derive new authority records from these records. You can copy text from an authority history record and then paste it into another record or document.
- Actions available on displayed authority history records are: Print Record and View Authority Record (to retrieve the current version of the record in distribution from the Authority File).
- **More?** For more information, search Help for the words **authority history**.
- Use authority history records:
 - Trace the history of a currently distributed authority record or an LCCN. For example, you might want to know when changes were made, or when a cross-reference or citation was added. Or you want to check the cancelled authority record when the distributed record contains a subfield **z** in field 010.
 - Check for headings that you can no longer find in a distributed record in the Authority File.
 - Identify changes made to a distributed authority record.
 - Determine the origin of a problem with a distributed record.

LCCN format details (field 010)

The format for the Library of Congress Control Number (LCCN) includes the following segments:

- Two or four year characters represent the year the record was created in machine-readable format
- Serial number of one to six digits
- Prefixes (n, nb, no, nr, ns, sh, sj)

The table provides details on data formatting for both pre-2001 LCCNs (2-digit year) and current LCCNs (4-digit year).

LCCN segment	Pre-2001 LCCN Length and position of segment	2001 and later LCCN Length and position of segment
Alphabetic prefix	Up to 3 letters Positions 1 through 3 1 to 3 leading blanks fill unoccupied positions Note: Prefix with 1 or 2 letters appears with letter(s) left-justified.	1 or 2 letters Positions 1 and 2 1 or 2 leading blanks fill unoccupied positions Note: Prefix with 1 letter appears with letter left-justified.
Year	2 digits Positions 4 and 5	4 digits Positions 3 through 6

Edit Authority Records

LCCN segment	Pre-2001 LCCN Length and position of segment	2001 and later LCCN Length and position of segment
Serial number	1 to 6 digits Positions 6 through 11 1-5 leading zeros fill unoccupied positions	1 to 6 digits Positions 7 through 12 1-5 leading zeros fill unoccupied positions
Supplement blank	1 blank after last digit of serial number Position 12	Not needed
Examples	Name authority records n 79063767 no 95015107 nr 00013605 Subject authority records sh 85010297 sh 99001533 Children's subject authority record sj 96006123	Name authority records nr2005026233 no2008131725 n 2008000884 Subject authority record sh2001000183 Children's subject authority record sj2004004943

4 Validate bibliographic or authority record

About validation

Validation is a system function that checks the quality of bibliographic and authority records and prevents records with errors from being added to or replaced in WorldCat or the Authority File.

- **Validation on command.** Validate a record as a separate step while creating or modifying a bibliographic or authority record. Use the **Validate Record** command (Edit list) to identify errors in the structure or data before taking a final action.
- **Automatic validation.** When you take a final action, the system automatically validates the record before completing the action you request. If validation detects errors, you must correct them and then try again to take the final action.

Note: Constant data. You cannot validate a constant data record. Connexion does no automatic validation of constant data records.

Validate record

	Action	Result
1	If not in Edit mode, on the Edit list click Edit Record or press <Alt><K> and then <L>.	
2	On the Edit list click Validate Record or press <Alt><K> and then <V>.	Connexion validates the entire record. If the record contains invalid elements (for example, tags, indicators or subfield codes) or invalid data (for example, fixed-field codes), Connexion displays error messages that identify the problem(s). Messages appear directly above the fields/elements to which they refer (template edit views). Messages appear above the text area in text area edit views. Messages about fixed-length fields (Leader, 008 or 006) appear between the Format list and the field elements.
3	Correct the error(s) and then retry validation.	

Edit Authority Records

Automatic validation on final actions

The following table shows the extent of automatic validation performed for each type of final action.

Final action	Validation performed
Bibliographic record	
Update Holdings Produce and Update Holdings Alternate Produce and Update	Default setting: By default, Connexion does not validate the record when you take these actions on an existing bibliographic record. Note: When you update holdings, even with validation level set to No , the system verifies that the following fields are present and, for some, checks for valid data: Leader, 001, 005, 008, 040 \$c, 049 and 245 \$a or 245 \$k. If any required field is missing, or in some cases contains invalid data, you receive an error message. Validation level set: If you select Basic or Full validation for actions that set holdings, Connexion does the specified level of validation.
Add new record to WorldCat (Update Holdings, Produce and Update Holdings, Alternate Produce and Update)	For new records, Connexion always does full validation.
Replace Record	Validates edited fields only.
Replace and Update Holdings	Validates edited fields only for the Replace action. Applies the user-specified validation level for the Update Holdings action.
Export Record	Default setting. By default, Connexion does not validate exported records. Validation level set: If you select Basic or Full validation for single-record exports, Connexion does the specified level of validation.
Delete Holdings	Does not validate the record. Note: For Delete Holdings, although Connexion does no validation, the system verifies that the following fields are present and, for some, checks for valid data: Leader, 001, 005, 008, 040 \$c, 049 and 245 \$a or 245 \$k. If any required field is missing, or in some cases contains invalid data, you receive an error message.
Authority record	
Add Record	Validates the entire record.
Replace Record	Validates edited fields only.

Final action	Validation performed
Export Record in MARC	<p>Default setting. By default, Connexion does not validate exported authority records.</p> <p>Validation level set: If you select Basic or Full validation for single-record exports, Connexion does the specified level of validation.</p>

Note: Check for duplicate 1xx headings when you add or replace a name authority record. As part of automatic validation for new or replaced name authority records, the system compares the established heading (1xx field) in the new/modified record with 1xx headings in all name authority records. The system also compares the 1xx heading in the new/modified record with 4xx cross-references present in the same record or any other record(s). If a normalized heading in the 100, 110, 111, or 130 field of the new/modified name authority record matches another 1xx heading or a 4xx cross-reference, the new/modified record fails validation and the system displays the following message:

**This main entry exists in another authority record:
LCCN=[LCCN] ARN=[ARN]**

To resolve the error, you must modify one of the records to differentiate them.

Currently, the system does **not** compare 4xx headings in new/modified records to 1xx headings in existing name authority records.

Specify validation levels for selected actions

Note: You can also set the validation level for exporting on the Export Option screen under **Validate Exported Bibliographic and Authority Records**. If you change the setting on either screen, it changes automatically on the other screen.

Note: When you select Basic or Full validation, each record must pass validation (in addition to the default Structure check) before Connexion completes the update or export action. If a record fails validation, you must correct the errors identified and then retry the update or export.

	Action
1	On the Cataloging Options screen, locate the Validation Levels setting.
2	<p>Set Holdings Select the level of validation to apply when you set holdings on a record.</p> <ul style="list-style-type: none"> • Structure (Default). Minimum validation. Verifies that indicators, if present, are a single character, that BLvl and Type codes are correct, and that the following fields are present (for some, also checks validity of data): Leader, 001, 005, 008, 040 \$c, 049, and 245 \$a or 245 \$k- • Basic. Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • Full. Verifies record structure (as for basic validation) and also checks relationships between elements. <p>Default setting: Structure. Note: When you add a record to WorldCat or replace a WorldCat record, Connexion always performs full validation.</p>
3	<p>Export Bibliographic Record Select the level of validation to apply when you export a single bibliographic record.</p> <ul style="list-style-type: none"> • None No validation for exported records. • Basic Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • Full Verifies record structure (as for basic validation) and also checks relationships between elements. <p>Default setting: None.</p>
4	Click Save My Default or Save for Session .

Errors detected

Validation verifies the following in records:

- Valid fixed-field values, tags, indicators, and subfields as defined in *OCLC-MARC Records* and *Bibliographic Formats and Standards*.
- Valid combinations of fixed-field values, tags, indicators, and subfields.
- Repeatability and nonrepeatability of tags and subfields.
- Valid number of characters in fields and records. The number of characters in a field cannot exceed 9,999. The number of characters in a record cannot exceed 99,999.

Note: Record size. Size limits applied by Connexion validation are defined by MARC21 standards. For offline products such as catalog cards and accessions lists, and for OCLC MARC Subscription records, record size is restricted to 50 variable fields and 4096 characters. Individual variable fields are limited to 4096 characters. Records used for these services may be truncated.

- Valid characters defined in *OCLC-MARC Records*.
- Valid structure in some non-textual variable fields, for example, 006, 010, 020, 022, 030, and 040.

Automatic data correction

To speed your cataloging process, Connexion corrects minor errors when you validate a record as a separate step (take the Validate Record action) or when the

system validates the record automatically when you take the Update Holdings, Produce and Update Holdings, Alternate Produce and Update or Replace Record action. Connexion corrects the following errors:

- If you enter fixed field values in the wrong case (upper- vs. lowercase) the system automatically changes them to the correct case (bibliographic records only).
- If the last character (check digit) in the ISBN or ISSN is a lowercase **x**, the system automatically changes it to uppercase (bibliographic records and authority records).
- If you enter **dlc** in lowercase in \$a of field 040, the system automatically changes it to uppercase (bibliographic records only).

5 Add non-Latin script in variant name headings in authority records

About non-Latin scripts in variant name headings

The Library of Congress and other major authority record exchange partners—British Library, National Library of Medicine, and OCLC, in consultation with the Library and Archives Canada—have implemented the use of non-Latin scripts in records for Name Authority Cooperative Program (NACO) contribution/distribution processes.

NACO participants can add non-Latin script variant forms of name headings to specified 4XX and 7XX fields, and non-Latin script supporting notes in specified 6xx fields, to WorldCat LC name authority records. Non-Latin data is valid in the following heading fields: 400, 410, 411, 430, 451, 700, 710, 711, 730, and 751. Non-Latin data is valid in any of the subfields found the following 6xx fields: 667, 670, and/or 675. Supported non-Latin scripts are limited to those scripts that represent the MARC-8 repertoire of UTF-8. The MARC-8 repertoire includes character sets for the following scripts:

- Arabic (including Persian)
- Chinese
- Cyrillic
- Greek
- Hebrew (including Yiddish)
- Japanese
- Korean

Connexion browser supports using non-Latin scripts for variant heading and notes fields.

Details

- The Latin script or romanized form of a heading in field 1XX remains the authorized heading.
- The LC authority file does not have paired records for Latin script and non-Latin script forms of name headings for the same entity.
- NACO contributors should follow MARC 21's "Model B" for multiscript records. Model B provides for **unlinked** non-Latin script fields, such as authority record 4XX fields, that have the same MARC tags used for Latin script data.
- Using Model B for authorities is a departure from the current bibliographic record practice of many Anglo-American Cataloging libraries, where non-Latin characters are exported as linked 880 fields (Alternate Graphic Representation) using the MARC 21 "Model A" for multiscript records.

Character sets supported

MARC-8 character sets for non-Latin scripts to be available for references in authority records are listed in MARC 21 Specifications for Record Structure, Character Sets, and Exchange Media, Code Tables. These character sets are subsets of UTF-8 Unicode that are approved for use in MARC 21 cataloging.

The following list of non-Latin scripts are supported for authority records:

- Basic Arabic = 33 (hex)
- Extended Arabic = 34 (hex)
- Chinese, Japanese, Korean (EACC) = 31 (hex)
- Basic Cyrillic = 4E (hex)
- Extended Cyrillic = 51 (hex)
- Basic Greek = 53 (hex)
- Basic Hebrew = 32 (hex)

Input non-Latin characters via Connexion browser

Connexion client offers extensive functionality for input, transliteration, character verification, and other tasks involved in cataloging with non-Latin scripts. Connexion browser does not provide built-in functionality to support direct input of non-Latin characters in authority records (or bibliographic records).

Two methods for inputting non-Latin scripts via Connexion browser:

- Copy the text from an electronic source text.
- Use the Windows® Character Map utility to copy each character and then paste each character into a heading field.

Copy/paste input. Connexion browser supports copying non-Latin text and pasting the copied characters into a 4xx, 6xx, or 7xx field in a name authority record.

Windows Character Map Procedure:

1. Open the Character Map. Open the Start Menu and navigate to: -> All Programs -> Accessories -> System Tools -> Character Map.
2. In the Character Map window, select the Arial Unicode MS font.
3. In the character chart, find the appropriate character set and then hover the mouse pointer on the character you want to insert. The name of the selected character appears in a popup. Double-click the character to add it to the program's copy buffer; selected characters appear in the **Characters to copy** box. Continue selecting characters until the box contains all the characters you want to insert in the record.
4. Click the **Copy** button or press <Ctrl><C> to copy the selected characters (contents of the **Characters to copy** box).
5. Switch to the name authority record you are editing. Click in a 4xx, 6xx, or 7xx field where non-Latin script data is valid.
6. To add the characters you selected and copied in the Character Map, right-click in the field and select **Paste** (or press <Ctrl><V>). The copied characters appear in the field.

Display problems with bidirectional Arabic and Hebrew data

Valid left-to-right character strings (multiple digit numbers and punctuation) appear mixed in with right-to-left script data in Arabic, Persian, and Hebrew records. Connexion browser does not control how these bidirectional strings display in lists or records. As a result, left-to-right data may display improperly.

To ensure that this bidirectional data displays correctly, use Unicode formatting control characters. The formatting control characters are embedded within the text. Formatting characters distinguish how to display mixed left-to-right and right-to-left data in an Arabic or Hebrew field. However, you cannot insert the formatting control characters when editing in Connexion browser.

Copy/paste input. Copied text may contain needed formatting characters. If the characters are present, bidirectional data copied from another source displays correctly via the browser interface.

Direct input in Connexion client. Using Connexion client, you can insert these control characters directly. After you complete editing and add or replace the record, bidirectional data displays correctly when you open the record in Connexion browser.

For details on formatting characters, see the *Bidirectional Algorithm report* on the Unicode Web site at: <http://unicode.org/reports/tr9>.

Find name authority records with non-Latin script

Connexion provides a **character set identifier/index** to support searching for records containing specific scripts. No script identifier appears in authority WorldCat records. However, you can use the **character sets present index (vp:)** (with the appropriate script codes) to search for or limit authority searches to those containing a specific script.

Databases. You can use the character sets present (vp:) index to search:

- Authorities database
- Authorities History database

Command line only. You can search the character sets present (vp:) index **only** by entering your search in the command line. The **vp:** index is not in the index lists provided on search screens or browse screens.

Script codes table. The following table lists the scripts and codes for searching.

Script	Code (with vp index)	Search example
Arabic	ara	vp:ara
Chinese, Japanese, Korean	cjk	vp:cjk
Cyrillic	cyr	vp:cyr

Script	Code (with vp index)	Search example
Greek	gre	vp:gre
Hebrew	hbr	vp:hbr

Connexion browser functionality supporting non-Latin script in authority records

Basic authority record functionality. You can create, edit, search, browse, and save authority records (and authority constant data records) that contain non-Latin text. You can also export authority records with non-Latin script data. All basic functions supported for other authority records apply to records that contain non-Latin scripts.

Multiple non-Latin scripts in a single record and/or a single field. A single record and a single field in a record can have multiple non-Latin scripts.

Validation Authority record validation:

- Is limited to name authority records (no sh/sj)
- Is limited to the following heading fields: 400, 410, 411, 430, 451, 700, 710, 711, 730, 751
- Is limited to specified 6XX notes fields. Non-Latin data is valid in any of the subfields found the following 6xx fields: 667, 670, and/or 675.
- Checks for display from left to right or right to left based on the Unicode range of the first character after the first subfield code
- Allows adding or replacing authority records only for characters supported in the MARC-8 repertoire of UTF-8.
- Allows exporting authority records with non-MARC-8 data added locally only if validation level is set to **None**.

6 Insert diacritics and special characters

Diacritics and special characters in Connexion

Character sets supported in Connexion services

- **WorldCat:** Only the ALA Character set is fully supported. The ALA Character set is a defined character set widely used by libraries in English-speaking countries. **ALA** refers to the American Library Association. The ALA Character Set supports the representation of characters (primarily the Roman alphabet and some special characters) and diacritics commonly used in Latin-based/ influenced languages.
- **Authority File:** Only the ALA Character set is fully supported.
- **Pathfinders:** Full Unicode support.
- **Dewey Services:** Displays in Unicode.
- **Unicode encoded in UTF-8:** To maximize Connexion's potential as a Web-based system for use by agencies worldwide, Connexion uses the UTF-8 character format to communicate with Web browsers and as its internal storage format. UTF-8 is a compact encoding of Unicode, a widely adopted standard that supports the communication of a large array of characters from the world's chief languages and scripts.

Connexion Database	Import	Editing/ Validation	Creation	Export
WorldCat	Conversion to Unicode	Unicode equivalents of ALA Character Set	ALA Character Set	OCLC MARC: ALA Character Set DC HTML & DC RDF: UTF-8
Authority File	N/A	Unicode equivalents of ALA Character Set	ALA Character Set	MARC21: ALA Character Set
Pathfinder database	Conversion to Unicode	Unicode	Unicode	UTF-8
WebDewey and Abridged WebDewey	N/A	N/A	N/A	N/A

Exported records

- **Bibliographic records exported as Dublin Core** records in DC HTML or DC RDF have their content encoded in Unicode.
- **Bibliographic records exported as MARC21** records have their content encoded in the ALA Character Set.
- **Authority records** are exported as MARC21 records and have their content encoded in the ALA Character Set.

**Character rendering:
bibliographic records
and authority records**

- **Pathfinders** are exported as UTF-8 in HTML.
- In a browser-based environment, several factors beyond OCLC's control can interfere with entering and viewing diacritics and special characters in their customary typographic forms:
 - Type and version of Web browser
 - Fonts available for the specific browser and version
 - Limitations of display devices
 - Limitations of input devices
- To minimize the anticipated problems with editing and display, Connexion employs character handling techniques that impose reasonable consistency on the display and input of diacritics and special characters.

**Unicode fonts
recommended**

- For best results when viewing and editing records and pathfinders, and when viewing Web-based resources, specify a **Unicode font** in your browser (font settings are found in Options or Preferences). Using a Unicode font lets you take full advantage of the system's adoption of the Unicode standard for character encoding.
- For an extensive set of diacritics and special characters, OCLC recommends that you have the **Arial Unicode Microsoft** font (Arial Unicode MS) installed on your workstation and specified in your browser. Microsoft provides the font with many applications, including Microsoft Office 2000, Office XP, FrontPage 2000 or later, and Publisher 2002 or later. The **Lucida Sans Unicode** font, provided with Microsoft Windows 2000 and Windows XP, has a less-complete character set but may meet your needs.

Browser font settings

- **Note:** You must have the recommended fonts installed on your workstation before you can select them in your browser.

Browser	Check or change font settings
Microsoft Internet Explorer Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Latin Based and User Defined language scripts.	<ol style="list-style-type: none"> 1. On the Tools menu click Internet Options. 2. In the Internet Options dialog box, on the General tab, click the Fonts button. 3. In the Fonts dialog box, from the Language Script list, select Latin Based. 4. Under Web Page Font, select Arial Unicode MS. 5. Under Plain Text Font, select a Unicode font if one is listed. 6. In the Fonts dialog box, from the Language Script list, select User Defined. 7. Under Web Page Font, select Arial Unicode MS. 8. Under Plain Text Font, select a Unicode font if one is listed. 9. Click OK to close the Fonts dialog box. Then click OK again to close the Internet Options dialog box.

Browser	Check or change font settings
<p>Netscape browsers Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Unicode and Western encoding.</p>	<p>Select fonts for Unicode encoding</p> <ol style="list-style-type: none"> 1. On the Edit menu click Preferences 2. In the left pane expand the Appearance category and then click Fonts. 3. In the right pane, from the Fonts For list, select Unicode. 4. From the Proportional list, select Sans Serif. 5. From the Sans Serif list, select Arial Unicode MS. 6. From the Monospace list, select Lucida Sans Unicode. 7. Click OK to apply the change and close the Preferences dialog box. <p>Select fonts for Western encoding</p> <ol style="list-style-type: none"> 1. Reopen the Preferences --> Fonts dialog box. 2. From the Fonts For list, select Western. 3. Repeat steps 4 through 7 to complete selecting Unicode fonts.

Input and display: edit mode

Entry methods supported

1. As Unicode characters (e.g., a u with umlaut entered as ü, a British pound sterling symbol entered as £).
 - If using Internet Explorer, you can open a window that lets you click a graphic of the desired character to insert characters in the ALA-defined set. (Windows only: not supported by Macintosh versions of IE.)
 - Or** Type Unicode characters using a Unicode-enabled keyboard.
 - **Or** Cut and paste Unicode characters from other sources such as the Connexion Diacritics window, other documents or the Windows Character Map utility.
2. Using a Connexion-modified, OCLC standard bar syntax.
 - Bar syntax represents a diacritic as a 2-character code between 2 pipe or vertical bar symbols (| |), placed beside the letter it modifies (e.g. a u with umlaut is entered as **u|um|**).
 - Bar syntax represents a special character as a 2-character code between two pipe or vertical bar symbols (| |) (e.g., a British pound sterling symbol is entered as **|ps|**).
 - Use the list of bar-syntax codes for diacritics and special characters from the ALA Character Set. The table of codes appears at the end of this section..

Display of ALA Character Set

- In edit mode, you can choose to display diacritics and special characters or to display their bar syntax coding. Use the option labeled Diacritics and Special Characters in Edit View on the Interface Customization Options screen.
- If you choose **Display Diacritic or Character** (default setting, Connexion displays the typographic forms of ALA characters in edit mode).

- If you choose **Display Bar Syntax**, Connexion automatically transforms all Unicode equivalents of the ALA Character Set diacritics and special characters into the Connexion-modified bar syntax when you take an action.
- When transformed to bar syntax, diacritics appear to the right of the characters they modify.

ALA Character Set

ALA Character entry method	Example	Display Diacritic or Character option	Display Bar Syntax option
Unicode character keyed or pasted	ü £	ü £	u um ps
Coded in bar syntax	u um	ü £	u um ps

Display of non-ALA Unicode characters

- Connexion displays the correct typographic forms of non-ALA Unicode characters, subject to limitations of the fonts installed on your workstation.,
- A character not available in the installed font is represented as an empty box.

Non-ALA Unicode Characters

Non-ALA Character entry method	Example	Result in Edit Mode	Transformed Example
Unicode character keyed or pasted	¥	Unicode character Or Empty box if character not available in font	¥ Or empty box

Appearance in display mode

Diacritic appearance in display mode

Letter + diacritic in record	Internet Explorer and Netscape (supported versions)
Character available in font (ALA or non-ALA)	Composed character
Character not available in font (ALA or non-ALA)	Letter followed by empty box

Special character appearance in display mode

Special character in record	Internet Explorer and Netscape (supported versions)
Character available in font (ALA or non-ALA)	Special character
Character not available in font (ALA or non-ALA)	Empty box

Enter ALA-defined diacritics and special characters

1. **Character chart window (requires Internet Explorer).** With Internet Explorer, you can open a window that lets you click a graphic of the desired symbol to insert diacritics and special characters. **(Note: Windows only. Not supported by Macintosh versions of IE.)**
2. **Bar syntax coding method.** Represent **diacritics** as 2-character mnemonic codes entered between vertical bar (pipe) (|) symbols. To produce a **letter with a diacritic** above or below it, type the code for the diacritic after the letter it modifies. Represent **special characters** as 2-character mnemonic codes entered between vertical bar (pipe) (|) symbols.
3. **Unicode composed characters method.** Enter letters with diacritics in their composed typographic forms. Produce composed characters in your choice of 3 ways:
 - Use the keyboard, if you have a keyboard map that supports entry of Unicode characters.
 - Copy desired characters from other text and paste them into a record you are editing in Connexion.

Connexion diacritics table. Click **Diacritics** on the header bar to open a window that contains a table of ALA Character Set diacritics and special characters. See the section titled **Table of diacritics and special characters for identification and input** for more information about this feature.

Character set test records. A good source for characters is OCLC's set of character set test records. To find the character set test records, search WorldCat via Connexion for the OCLC control numbers #8448190, #8460397, and #8463440. Retrieving these records incurs a search charge. To avoid re-searching, save the test records.

Other Windows-based or Web-based text may work also. You may need to experiment to find the best sources.

- Use the Character Map utility (in the Accessories group on the Windows Start menu) in either Windows 2000 or Windows XP (Unicode-compliant operating systems).

Character chart window (Internet Explorer for Windows only)

	Action
1	Place the cursor where you want to insert a diacritic or special character. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. <p>Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol.</p>
2	From the Edit menu, select Enter Diacritics .
3	In the Enter Diacritics and Special Characters window, click a diacritic or special character to insert it at the cursor position.
4	When finished entering ALA characters, click Close .

Bar syntax coding method

Action
<p>Letter with diacritic above or below</p> <ol style="list-style-type: none"> 1. First type the letter. 2. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 3. Then type the mnemonic for the diacritic. 4. Type another vertical bar symbol. <p>Example: To produce a u with umlaut type u um </p> <p>Special character</p> <ol style="list-style-type: none"> 1. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 2. Then type the mnemonic for the diacritic. 3. Type another vertical bar symbol. <p>Example: To produce a British pound symbol, type ps </p>

Unicode keyboard or copy/paste method

Action
<ul style="list-style-type: none"> • Type the composed character (letter with diacritic) or special character using a Unicode enabled keyboard. <p>Or</p> <ol style="list-style-type: none"> 1. Copy the composed character (letter with diacritic) or special character from <ul style="list-style-type: none"> — The Connexion table of ALA characters. To view the table, click Diacritics on the header bar. — Another record or an OCLC character set test record. — The Windows Character Map — Other Windows-based or Web-based text. 2. Paste the character into the record. <p>Example: To produce a u with umlaut, type (or paste) ü</p>

Entry rules for ligatures, paired diacritics, multiple diacritics

- Enter all diacritics to the right of the letter they modify.
- The following table shows how to apply this rule to enter more complex character/diacritic combinations.

Diacritic	Entry rules
Ligatures i and a with ligatures	<p>Rule Enter letters and ligatures in this order: Letter1-LigatureLeft-Letter2-LigatureRight</p> <p>Examples i-LigatureLeft-a-LigatureRight = i a r </p>

Diacritic	Entry rules
Double tilde n and g with double tilde	Rule Enter letters and tildes in this order: Letter1-TildeLeft-Letter2-TildeRight Examples n-TildeLeft-g-TildeRight = n tl g tr
Diacritic above and below a with dot below and circumflex r with circle below and macron	Rule Enter letter and diacritics in this order: Letter-DiacriticBelow-DiacriticAbove Examples a [·] _˘ = a db cf r _˘ = r cb ma
Two diacritics above u with tilde and macron o with acute and circumflex a with grave and circumflex	Rule Enter diacritics from letter outward: Letter-DiacriticNearer-DiacriticFarther Examples u [~] _˘ or u td ma o [˘] = o ac cf a [˘] = a gr cf

Enter non-ALA Unicode characters

Unicode keyboard or copy/paste method. Produce characters in your choice of 3 ways:

1. Use the keyboard, if you have a keyboard map that supports entry of Unicode characters.
2. Copy desired characters from other text and paste them into a text box in Connexion. Any Windows-based or Web-based text may work. You may need to experiment to find the best sources.
3. Use the Character Map utility (in the Accessories group on the Windows Start menu) in either Windows NT 4.0 or Windows 2000 (Unicode-compliant operating systems).

Action
<ul style="list-style-type: none"> • Type the composed character (letter with diacritic) or special character using a Unicode enabled keyboard. Or <ol style="list-style-type: none"> 1. Copy the composed character (letter with diacritic) or special character from another source or from the Windows Character Map. 2. Paste the character into the record. Example: To produce a yen currency symbol, type (or paste) ¥

Subfield delimiter and dollar sign (MARC edit views)

- To enter a subfield delimiter (‡) in MARC Template or MARC Text Area edit view,
 - Type a single **dollar sign (\$)**. Press <Shift><4> to create the \$. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode.
- To enter a **dollar sign** as a currency symbol (not to represent a subfield delimiter): In MARC Template or MARC Text Area edit view, type **2** dollar signs (**\$\$**). Do not type a space between the 2 dollar signs.

Table of diacritics and special characters for identification and input

About the table

While editing, you can consult a quick-reference table that lists

- Name of the diacritic or special character
- Bar-syntax mnemonic code for inputting the diacritic or character
- Examples that illustrate the appearance of the diacritic or character
- Languages in which the diacritic/character is used
- Notes on appropriate use (where applicable)

View the table of diacritics and special characters

Action	Result
On the header bar (black bar at the top of every system screen), click Diacritics .	The table of diacritics and special characters appears in a new browser window.

Use the table of diacritics and special characters

- **Review guidelines.** Before using the table, click the link **Guidelines for Use** to jump to important reminders and precautions. Please review this information before copying text from the table into a record.

To	Do this
Find a character or language by name.	<ul style="list-style-type: none"> • On the browser's Edit menu (or Search menu), click Find. • Or • Press <Ctrl><F> • In the Find dialog box, type the character name or language name and click OK.
Identify a character.	<ul style="list-style-type: none"> • Scroll the table and find the character image in the Examples column.

To	Do this
Copy and paste from the table to enter a diacritic or special character.	<ul style="list-style-type: none"> Find the diacritic or character you want to use. Select the bar-syntax code. Or Select an image in the Examples column. On the browser's Edit menu, click Copy. Or press <Ctrl><C>. Switch to the browser window that contains the record you are editing. Click once in the record where you want to insert the character. On the browser's Edit menu click Paste. Or press <Ctrl><V>.

Bar syntax codes for diacritics and special characters

To insert this symbol or character	Type this code
acute accent (diacritic)	ac
ae digraph lowercase	ae
AE digraph uppercase	AE
alif	al
ayn	ay
breve (diacritic)	br
candrabindu (diacritic)	cu
caret/circumflex (diacritic) (nonspacing)	cf
caret/circumflex (spacing)	^
cedilla (diacritic)	ce
circle above (diacritic)	ca
circle below (diacritic)	cb
high comma centered (diacritic)	cc
high comma off center (diacritic)	co
copyright sign	cs
d with cross bar lowercase	dc
D with crossbar uppercase	DC
degree sign	ds
dot below (diacritic)	db
dot in middle	dm

To insert this symbol or character	Type this code
double acute (diacritic)	da
double dot below (diacritic)	dd
eth lowercase	et
Eth uppercase	ET
grave (diacritic) (nonspacing)	gr
grave (spacing)	`
Greek alpha	ga
Greek beta	gb
Greek gamma	gc
hacek (diacritic)	ha
hook left (diacritic)	hl
hook right (diacritic)	hr
hooked o lowercase	ho
hooked O uppercase	HO
hooked u lowercase	hu
hooked U uppercase	HU
Icelandic thorn	it
Icelandic thorn uppercase	IT
inverted exclamation point !	ie
inverted question mark ?	iq
ligature left half (diacritic)	ll
ligature right half (diacritic)	lr
macron (diacritic)	ma
musical flat	mf
musical sharp	ms
miagkiy znak	mz
non-breaking space	
oe digraph lowercase	oe
OE digraph uppercase	OE
Polish l lowercase	pl
Polish L uppercase	PL
plus or minus	pm
pound sterling	ps
pseudo question mark ? (diacritic)	pq
right cedilla (diacritic)	rc

To insert this symbol or character	Type this code
recording sign	rs
script l	sl
Scandinavian o with slash lowercase	so
Scandinavian O with slash uppercase	SO
subscript patent mark	bp
subscript left parenthesis	b(
subscript right parenthesis	b)
subscript plus	b+
subscript minus	b-
subscript 0	b0
subscript 1	b1
subscript 2	b2
subscript 3	b3
subscript 4	b4
subscript 5	b5
subscript 6	b6
subscript 7	b7
subscript 8	b8
subscript 9	b9
superior dot (diacritic)	sd
superscript left parenthesis	p(
superscript right parenthesis	p)
superscript plus	p+
superscript minus	p-
superscript 0	p0
superscript 1	p1
superscript 2	p2
superscript 3	p3
superscript 4	p4
superscript 5	p5
superscript 6	p6
superscript 7	p7
superscript 8	p8
superscript 9	p9
Turkish l	ti

To insert this symbol or character	Type this code
tilde left (diacritic)	tl
tilde right (diacritic)	tr
tilde (diacritic) (nonspacing)	td
tilde (spacing)	~
tverdyi znak	tz
umlaut (diacritic)	um
underscore (diacritic) (nonspacing)	us
underscore double (diacritic)	ud
underscore (spacing)	–
upadhmaniya (diacritic)	up
vertical bar	ba
0 (zero) width joiner	zj
0 (zero) width non-joiner	zn

7 Enter Diacritics window

Use this window

- **Requires Internet Explorer browser.** To use the Enter Diacritics and Special Characters window, you must log on to Connexion using Microsoft Internet Explorer.
- **Note: Windows only.** Not supported by Macintosh versions of IE.

Insert diacritics and characters from an ALA-defined set into

- Bibliographic records for items in languages other than English.
- Authority records for names and subjects in languages other than English.
- Pathfinders with content in languages other than English.

Open this window

	Action
1	Place the cursor where you want to insert a diacritic or special character. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol.
2	From the Edit menu, select Enter Diacritics .

Features

Feature	How to use
Chart with graphics of diacritics and special characters	<ul style="list-style-type: none"> • View all characters and diacritics available for insertion in records. • Click a character or diacritic to insert it at the cursor position. • WorldCat and the Authority File support only the standard character set defined by the American Library Association (ALA).
Character list	<ul style="list-style-type: none"> • Click the name of a diacritic or special character to select it. The selected symbol is highlighted in the graphical chart. • When you point to a diacritic or special character in the chart, the name of that symbol appears in the Characters list box. • Default setting: None
Language list	<ul style="list-style-type: none"> • Click the name of a language to highlight in the chart diacritics and special characters used for that language. • The window retains your language selection until you choose another language. • Default setting: None

Buttons

Button	How to use
Close	Close the window.

Button	How to use
Help	View a context-specific Help topic that explains how to use the window.

Entry procedure

	Action
1	Place the cursor where you want to insert a diacritic or special character. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol. Enter ligatures, paired diacritics, or multiple diacritics
2	From the Edit menu, select Enter Diacritics .
3	In the Enter Diacritics and Special Characters window, click a diacritic or special character to insert it at the cursor position.
4	When finished entering ALA characters, click Close .

Unicode fonts recommended

- For best results when viewing and editing records and pathfinders, and when viewing Web-based resources, specify a **Unicode font** in your browser (font settings are found in Options or Preferences). Using a Unicode font lets you take full advantage of the system’s adoption of the Unicode standard for character encoding.
- For an extensive set of diacritics and special characters, OCLC recommends that you have the **Arial Unicode Microsoft** font (Arial Unicode MS) installed on your workstation and specified in your browser. Microsoft provides the font with many applications, including Microsoft Office 2000, Office XP, FrontPage 2000 or later, and Publisher 2002 or later. The **Lucida Sans Unicode** font, provided with Microsoft Windows 2000 and Windows XP, has a less-complete character set but may meet your needs.

Browser font settings

- **Note:** You must have the recommended fonts installed on your workstation before you can select them in your browser.

Browser	Check or change font settings
<p>Microsoft Internet Explorer</p> <p>Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Latin Based and User Defined language scripts.</p>	<ol style="list-style-type: none"> 1. On the Tools menu click Internet Options. 2. In the Internet Options dialog box, on the General tab, click the Fonts button. 3. In the Fonts dialog box, from the Language Script list, select Latin Based. 4. Under Web Page Font, select Arial Unicode MS. 5. Under Plain Text Font, select a Unicode font if one is listed. 6. In the Fonts dialog box, from the Language Script list, select User Defined. 7. Under Web Page Font, select Arial Unicode MS. 8. Under Plain Text Font, select a Unicode font if one is listed. 9. Click OK to close the Fonts dialog box. Then click OK again to close the Internet Options dialog box.
<p>Netscape browsers</p> <p>Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Unicode and Western encoding.</p>	<p>Select fonts for Unicode encoding</p> <ol style="list-style-type: none"> 1. On the Edit menu click Preferences 2. In the left pane expand the Appearance category and then click Fonts. 3. In the right pane, from the Fonts For list, select Unicode. 4. From the Proportional list, select Sans Serif. 5. From the Sans Serif list, select Arial Unicode MS. 6. From the Monospace list, select Lucida Sans Unicode. 7. Click OK to apply the change and close the Preferences dialog box. <p>Select fonts for Western encoding</p> <ol style="list-style-type: none"> 1. Reopen the Preferences --> Fonts dialog box. 2. From the Fonts For list, select Western. 3. Repeat steps 4 through 7 to complete selecting Unicode fonts.

8 Authority record actions: edit modes

Edit modes and edit views

- **Edit mode.** You are in local edit mode when you use the **Edit Record** action to begin editing the record. The WorldCat record is not locked in the OCLC AuthorityFile.
- **WorldCat edit mode.** You are in WorldCat edit mode when you use the **Lock WorldCat Record** action to begin editing a record. The WorldCat authority record is locked in the OCLC Authority File.
- **MARC edit views.** MARC (template view) or MARC Text Area (text area view)
- **Display view in edit mode.** While in WorldCat edit or local edit mode, you can switch to a display view of the record via the **Display Record** action. You remain in your original edit mode. From the display view, some editing actions are not available. To resume editing the record, use the **Back to Editing** action.
- **Display mode.** You are in display mode **when you have not begun editing a record**. Display mode is in effect when you retrieve a single record or click a heading in a search results list.
- **Switch to display mode from edit mode.** You switch from edit mode to display mode when you take a final action (Replace, Export, etc.), when you save a record, or when you take the Cancel Changes action.

Actions available in edit mode

Action	How To
Display Record	On the Edit list, click Display Record . The system presents the current record in a display view. Return to the edit view of the record. On the Action list, click Back to Local Edit or Back to WorldCat Edit .
Reformat Record	On the Edit list, click Reformat Record . The system redisplay the record. Reformatting removes empty fields and arranges fields in (approximate) ascending tag number order.
Validate Record	On the Edit list, click Validate Record . For a valid record, the system redisplay the record. If the record contains invalid data, the system displays 1 or more error messages that identify the problem(s). Messages appear directly above the fields/elements to which they refer. Correct any validation errors. Validate the record again to verify.
Print Record	1. On the Action list click Print Record . Or Press <F12>. 2. In the Print dialog box, click Print .

Action	How To
Report Error	<p>Report an error in a record by sending an e-mail message to OCLC quality control staff.</p> <ol style="list-style-type: none"> 1. View the authority record for which you want to report an error. 2. On the Action list click Report Error or press <Alt><K> and then <7> (or press <Alt><J> and then < 7>). 3. In the Report Error dialog box, complete the required fields at the top of the window: OCLC Symbol, User Name, and E-Mail. 4. In the large text box, type a description of the problem. 5. (Optional) To request a copy of the e-mail message containing the error report, select the check box labeled Send a copy of the e-mail message to me. 6. Click Report Error to send the error report.
<p>Save Record Save a new or existing record or resave a saved record</p>	<p>On the Action list, click Save Record. The system asks you to assign a workflow status to the record and to confirm that you want to save it. Open the list of statuses and click the status most appropriate for the record's position in your workflow. Click Yes to confirm that you want to save the record.</p> <p>Results The system presents the saved record in a display view. The save file slot number appears at the top of the screen. The record remains in the Authority Save File for 90 days. If not resaved to restart aging, it is automatically deleted.</p> <p>New record. A saved new record is deleted from the save file when you add the record to the Authority File. WorldCat record. A saved WorldCat record is deleted from the save file when you replace the record in the Authority File.Or Click No to cancel saving the record.</p> <p>Locked WorldCat record When you save a locked WorldCat record, the system places along-term (14-day) lock on the WorldCat record in the OCLC Authority File. Other users can retrieve a copy, but cannot change the WorldCat record.</p> <p>Resave record When you resave a record, the system resets the record's age in the save file to 0 days.</p>
Delete Save File Record (saved records only)	<p>On the Action list, click Delete Save File Record. Then click OK to confirm that you want to delete the record. Or Click Cancel to keep the record in the Authority Save File.</p> <p>Results If you click OK, the system deletes the record and displays a confirmation message. If you click Cancel, the system redisplay the record in the view you were using.</p>

Action	How To
Cancel Changes	<p>On the Edit list, click Cancel Changes. The system asks you to confirm that you want to discard changes you made while editing the record. Click Yes to cancel edits. Or click No to keep your changes and continue editing.</p> <p>Results Existing record. The system redisplayes the record from the Authority File, in display mode. Any locks on the record are released. New record (saved). The system redisplayes the record from the Authority Save File. New record (unsaved). The system deletes the record and returns you to the Create Record screen.</p>
Derive New Record Not available for subject authority record	<p>In the Edit list, click Derive New Record. The record content is redisplayed for editing. NEW appears in the OCLC: field. When you add a new record based on the derived record to the Authority File, the system supplies</p> <ul style="list-style-type: none"> • An OCLC authority record number (ARN) • A Library of Congress control number (LCCN) • Your organization code in the 040 field
Unedit Record	<p>In the Edit list, click Unedit Record. The system redisplayes the record as originally retrieved from the Authority File (for an unsaved record) or as last saved (if the record is in the Authority Save File). The record remains in the edit mode you were using. Any locks are retained.</p>

Action	How To
<p>Add Record (NACO authorized users only) Not available for subject authority record</p>	<p>Complete the new record you are editing. Or Retrieve the completed record from the Authority Save File in edit mode.</p> <p>Prevent duplicate records</p> <ul style="list-style-type: none"> • Search the Authority File immediately before adding the new record verify that no other user has created a record for the heading since you began working on your record. <p>Add new record</p> <ul style="list-style-type: none"> • If you find no existing records, open the Action list and click Add Record. • Click OK to confirm that you want to add the record. <p>Results</p> <ul style="list-style-type: none"> • The system validates the record. If the system reports validation errors, make the necessary corrections and retry adding the record. <p>When the record is valid, the system</p> <ul style="list-style-type: none"> • Adds the record to the OCLC Authority File. • Assigns an OCLC authority record number (ARN) and a Library of Congress control number (LCCN). • Stores the record for delivery to the Library of Congress for approval. • Adds the record to the Authority File. • Locks the new WorldCat record pending Library of Congress approval. When LC staff approve the record and insert the date/time in field 005, the record is unlocked. (Note: Your lock on the record is released.) • Deletes the original record from the Authority Save File. • Displays the new authority record, including the assigned ARN and LCCN (local edit mode). • Displays a message confirming that the record has been added to the OCLC Authority File.
<p>Release Lock (WorldCat edit mode only)</p>	<p>On the Action list, click Release Record Lock. Click OK to confirm that you want to replace the record. The WorldCat authority record is unlocked in the OCLC Authority File. You switch to local edit mode.</p>

Action	How To
Replace Record (NACO authorized users only) (WorldCat editmode only) Not available for subject authority record	<p>On the Action list, click Replace Record. Click OK to confirm that you want to replace the record.</p> <p>Results</p> <p>Validation</p> <ul style="list-style-type: none"> • The system tries to replace the record in the Authority File. The system validates the record before replacing it. • If the record contains invalid data, the system returns you to edit mode. Validation messages inserted in the record highlight errors. Correct the errors and then retry replacing the record. <p>Replace in Authority File</p> <p>When the record is valid, the system:</p> <ul style="list-style-type: none"> • Replaces the record in the Authority File. • Stores the record for delivery to the Library of Congress for approval. • Locks the replaced WorldCat record pending Library ofCongress approval. • Deletes the modified record from the Authority Save File. • Displays the modified WorldCat authority record (local editmode). • Displays a message confirming that the record has been replaced in the OCLC Authority File.

Action	How To
Submit for Review	<ol style="list-style-type: none"> 1. Prepare the record you want to submit for review. 2. On the Action list, click Submit for Review or press <Alt><K><>> (right angle bracket). 3. In the popup window, check the displayed list of reviewer institutions and edit the list if necessary. Or Type a list of OCLC symbols, separated by semicolons. Note: You can enter symbols in lowercase or uppercase. The system converts symbols to uppercase before validating them. 4. Click OK to submit the record for review. Or click Cancel if you do not want to submit the record now. <p>Results When you click OK, the system:</p> <ul style="list-style-type: none"> • Validates OCLC symbols you supplied. If any symbol is invalid, the system does not submit the record. An error message identifies the invalid symbol(s). You must retry submitting the record. When prompted, correct all invalid symbols and then click OK. • Sets the record's Review status to Submitted for Review. • For a locked WorldCat record, retains any lock on the record inWorldCat or the Authority File. • Automatically saves the record to the bibliographic save file or the authority save file. • Displays the submitted record (display mode). • Displays messages confirming that the record has been submitted and that the record has been saved. • Shows the record's save file number.
Recall Submitted Record	<ol style="list-style-type: none"> 1. Retrieve the record you want to recall. 2. On the Action list, click Recall Submitted Record or press <Alt><K><<> (left angle bracket). 3. Click OK to recall the record. Or click Cancel if you do not want to recall the record now. <p>Results When you click OK, the system:</p> <ul style="list-style-type: none"> • Removes the Review status Submitted from the record. • For a locked WorldCat record, retains any lock on the record inWorldCat or the Authority File. • Automatically resaves the record to the bibliographic save file or the authority save file. • Displays the record (display mode). • Displays messages confirming that the record has been recalled and that the record has been saved. • Shows the record's save file number.
Derive New Constant Data Record	<p>On the Edit list, click Derive New Constant Data Record. Edit the new CD record to add or revise content. On the Action list click Save Constant Data Record. In the dialog box, enter a name for the constant data record. Use a name that indicates the content or purpose of the constant data. Then click OK to add the record to your institution's constant data database.</p>

Action	How To
Apply CD By Name	<ol style="list-style-type: none"> 1. Retrieve the authority record to which you want to apply a constant data record. The record must be in edit mode. 2. On the Edit list, click Apply CD By Name or press <Alt><K> and then <5> (or <Alt><J> and then <5>). An entry opens above the record header. 3. Specify fields to apply. In the entry area, select the option button for Whole Record or Variable Fields Only or Fixed Field Only. 4. In the Specific CD Name text box, type the name of the constant data record you want to apply. 5. Click Apply CD or press <Enter>.
Apply CD From List	<ol style="list-style-type: none"> 1. Retrieve the authority record to which you want to apply a constant data record. The record must be in edit mode. 2. On the Edit list, click Apply CD From List or press <Alt><K> and then <6> (or <Alt><J> and then <6>). 3. Specify fields to apply. In the Select Constant Data window, select the option button for Whole Record or Variable Fields Only or Fixed Field Only. 4. In the list of constant data records, click the hyperlinked name of the constant data record you want to apply.
Apply Default CD	<p>In the Edit list, click Apply Default CD or press <Alt><K> and then <C>.</p> <p>Results:</p> <ul style="list-style-type: none"> • Fields in your default constant data are inserted in the authority record as follows: • Values of elements in the fixed field (008) replace corresponding elements in the authority record, unless the authority constant data contains asterisks (*) in place of a value. Or edit your default constant data and set the MARC Fields to Apply option to Variable fields only. • Variable fields in default constant data are added to the authority record. Constant data variable fields do not replace corresponding variable fields in the authority record. Edit the resulting record to combine or delete unwanted repeated variable fields. • Fields applied. Depending on the option you selected within the default constant data, the system adds the entire record, the fixed fields only, or the variable fields only. <p>Change fields applied To change the setting for this option, edit your default constant data. On the Authorities tab, under Show Options, click Default CD. You cannot change the setting for each record when adding authority constant data; you must set it in the default constant data before you apply default constant data to an authority record.</p>

Action	How To
Select Constant Data	<p>On the Edit list, click Select Constant Data (Optional) In the Select Constant Data window, specify which fields of the constant data record you want applied to the authority record.</p> <ul style="list-style-type: none"> • Click to select the option button for Whole Record or Variable Fields Only or Fixed Field Only. • Default setting: Whole Record. <p>In the list of constant data records, click the hyperlinked name of the constant data record you want to apply.</p> <p>Results</p> <ul style="list-style-type: none"> • MARC constant data fields applied. Depending on the option you selected, the system adds the entire record, the fixed field only, or the variable fields only.
Export Record in MARC	<p>On the Action list, click Export Record in MARC.</p> <ul style="list-style-type: none"> • Validation. By default, Connexion does not validate authority records before exporting them. For single-record exports, you can request basic or full validation. For records that fail validation, you must correct errors and then retry exporting. • For export to a file (default), the system adds the record to a file on the Connexion server. Exported records are appended to the same file until you download the file. • For TCP/IP export (direct to local system), the system exports the record immediately. <p>Note: You cannot export a new authority record (without an LCCN or ARN).</p>
View Authority History Record(s)	<p>To retrieve superseded or deleted versions of the Authority File record, on the View list, click View Authority History Record(s) or press <Alt><K> and then <H>.</p> <p>Result:</p> <p>Connexion searches the Authority History database for records with the same OCLC ARN. A single record or a results list appears in a new window. Authority History records are view-only; you cannot edit, save, or export the records.</p>
Flag Authority Record	<p>On the Action list, click Flag Authority Record.</p> <p>The record remains flagged during the current session or until you unflag it.</p>
UnFlag Authority Record	<p>On the Action list, click Unflag Authority Record.</p>

About the Authority History database

- If you retrieved this record from the Authority History database, please note the following points about the purpose of this database and the limited functionality available for using the records.
- The Authority History database permanently stores:
 - All previous, now superseded, versions of authority records distributed by the Library of Congress
 - Versions of newly added and modified records distributed to Library of Congress by OCLC NACO participants

About authority history records

- Copies of current authority records sent from LC via the distribution cycle (includes all records in the Authority File)
- Name authority records deleted by OCLC quality control staff
- Database coverage begins in the 1980's.
- Records are stored and displayed in the MARC21 authorities format.
- Authority history records are view-only and always appear in display mode in the MARC Template view.
- A timestamp at the top of the record shows the date and time when the record was added to the Authority History database. (Records in the Authority File do not contain a timestamp.)
- You cannot edit, save, export, or derive new authority records from these records. You can copy text from an authority history record and then paste it into another record or document.
- Actions available on displayed authority history records are: Print Record and View Authority Record (to retrieve the current version of the record in distribution from the Authority File).
- **More?** For more information, search Help for the words **authority history**.
- Use authority history records:
 - Trace the history of a currently distributed authority record or an LCCN. For example, you might want to know when changes were made, or when a cross-reference or citation was added. Or you want to check the cancelled authority record when the distributed record contains a subfield **z** in field 010.
 - Check for headings that you can no longer find in a distributed record in the Authority File.
 - Identify changes made to a distributed authority record.
 - Determine the origin of a problem with a distributed record.

Open authority history record(s) from distributed authority record

When viewing a distributed authority record from the Authority File, you can quickly retrieve all superseded authority records that have the same OCLC ARN.

Notes on this function:

Not available from save file records. When viewing a saved authority record from the Authorities save file, the **View Authority History Record(s)** action is not available

Copy of distributed record retrieved. The Authority History database contains a copy of each distributed authority record. Therefore, your search always retrieves the same record that you were viewing from the Authority File. You may retrieve other superseded records, or only a copy of the distributed record.

Viewing a referenced record via a linked 5xx field. A referenced record viewed from a 5xx link is for display only; the **View Authority History Record(s)** action is not available. To retrieve superseded versions of the record, search for the Authority File or the Authority History database.

Action	Result
In the distributed authority record (retrieved from the Authority File), On the Action list click View Authority History Record(s) or press <Alt><K> and then <H> (or <Alt><J> and then <H>)..	The system searches for the distributed record's ARN in the Authority History database. If the search retrieves one record (a copy of the distributed authority record), the record appears in a separate window. If the search retrieves multiple records, a search results list appears in a separate window. The first record in the results list is typically a copy of the distributed authority record.

Open a distributed authority record from an authority history record

When viewing a superseded authority record (retrieved by searching or browsing the Authority History database), you can quickly retrieve the distributed authority record that has the same OCLC ARN.

Action	Result
In the authority history record (retrieved by searching or browsing the Authority History database), On the View list click View Authority Record or press <Alt><K> and then <A> (or <Alt><J> and then <A>)..	The system searches for the superseded record's ARN in the Authority File. If the search retrieves a record, the record appears in a separate window. If the distributed record has been deleted from the Authority File, you receive a message stating that no record was found. The message includes the number of authority history records available for that ARN.

Record actions summary

- The following table defines record actions and indicates the mode(s) in which each action is available for a user with the required authorization level.
- Availability of some actions depends on whether or not the record is in the Authority Save File. Other actions are not available for a new record (without an LCCN or OCLC ARN).

Edit Authority Records

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Add Record (new record only) Not available for subject authority record	Add a new record to the OCLC Authority File.	NAR, NAN, ENN, CON (NACO)	Yes	No	No
Derive New Constant Data Record	Create a constant data record based on an authority record.	Limited	No	Yes	Yes
Apply CD By Name	Apply a specific constant data record by typing the CD name.	Limited	Yes	Yes	No
Apply CD From List	Retrieve and apply a stored constant data record to the authority record you are editing. Choose to apply the whole CD record, fixed field only, or variable fields only.	Limited	Yes	Yes	No
Apply Default CD	Insert content from your default constant data.	Limited	Yes	Yes	No
Select Constant Data	Retrieve and apply a constant data record to the authority record you are editing. Choose to apply the whole CD record, fixed field only, or variable fields only.	Limited	Yes	Yes	No
Back to Editing	In edit mode, return from a display view of the record to an edit view (appears in the display view only).	Limited	Yes	Yes	No

Edit Authority Records

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Cancel Changes	<p>Existing record. The system redisplay the record from the Authority File, in display mode. Any locks on the record are released.</p> <p>New record (saved). The system redisplay the record from the Authority Save File.</p> <p>New record (unsaved). The system deletes the record and returns you to the Create Record screen.</p>	Limited	Yes	Yes	No
Delete Save File Record (saved record only)	Remove record from the Authority Save File.	Limited	Yes	Yes	No
Derive New Record Not available for subject authority record	Create a new name authority record based on the displayed authority record or on a controlled name heading in a bibliographic record.	Limited	No	Yes	Yes

Edit Authority Records

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Display Record	View record as presented when first retrieved from the Authority File or Authority Save File.	Search	Yes	Yes	No
Edit Record (saved records only)	Begin editing a saved authority record (in WorldCat edit mode if therecord is locked, in local edit mode if unlocked)	Limited	Yes	Yes	Yes
Lock WorldCat Record Not available for subject authority record	Lock and modify the WorldCat copy of the record.	Limited	No	Yes	Yes
Edit Record	Modify a working copy of the record without affecting the WorldCat record.	Limited	Yes	No	Yes
Export Record in MARC (existing record only)	Store the record in a file on the Connexion server (default) or export directly to your local system via TCP/IP.	Search	Yes	Yes	Yes
Reformat Record	Refresh the edit view to reorder fields.	Limited	Yes	Yes	No
Release Lock Not available for subject authority record	Unlock a locked WorldCat authorityrecord.	Limited	Yes	No	No

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Replace Record (existing record only) Not available for subject authority record	Overwrite the WorldCat authority record with your modified working copy. Replace the record in the OCLC Authority File.	NAR, NAN, ENN, CON (NACO)	Yes	No	No
Report Error	Report an error in the record via e-mail.	Limited	Yes	Yes	Yes
Save Record	Place the record in the Authority Save File. Or Resolve the record in the Authority Save File; restart save file aging for the record (reset to 90 days).	Limited	Yes	Yes	No
Submit for Review	Submit a record for review by colleagues at other institutions.	Limited	Yes	Yes	Yes
Recall Submitted Record	Remove Review status from a submitted record; the record is no longer available for review.	Limited	Yes	Yes	Yes
View Authority History Record(s)	Retrieve superseded or deleted versions of the Authority File record.	Search	Yes	Yes	Yes
Flag Record	Mark the record to set it aside for further use during the current session.	Search	Yes	Yes	Yes
UnFlag Record	Remove a flag from the record.	Search	Yes	Yes	Yes
Unedit Record	The system redisplay the record as originally retrieved from the Authority File (for an unsaved record) or as last saved (if the record is in the Authority Save File). The record remains in the edit mode you were using. Any locks are retained.	Limited	Yes	Yes	No

Edit Authority Records

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Validate Record	Check the content and format of the authority record using system validation rules.	Limited	Yes	Yes	No

9 Print bibliographic or authority record

Why print a record?

- Mark up printed text to guide online editing.
- Support offline reviewing or proofreading new or edited records.
- Track progress of a record through the processing workflow.

Print a bibliographic or authority record

Action	
1	Retrieve a bibliographic or authority record or create a new record.
2	<ul style="list-style-type: none"> • On the Action list, click Print Record. Or • Press <F12>. Connexion formats the record for printing and transmits the formatted record to the browser.
3	In the Print dialog box, click Print .

Printed Content or Formatting	Description / Notes
Overall appearance	<ul style="list-style-type: none"> • Resembles the display view of the record, not the edit view (no text boxes, etc.). • Excludes interface elements (lists, navigation buttons, etc.) that are not part of record content or administrative information.
Record Header	<p>Database or workform name</p> <ul style="list-style-type: none"> • Database from which you retrieved the record. • New record. Database to which you added the new record. • Workform. Workform name for new record not yet saved or added. <p>Title, heading, or constant data name (truncated if longer than one line).</p> <ul style="list-style-type: none"> • MARC bibliographic record. The printed title includes text from subfields \$a, \$f, \$g, \$k, \$n, and \$p. • MARC authority record. The printed heading includes text from all alphabetic subfields. • Dublin Core bibliographic record. Title includes all text in the Title element. • Note: For MARC and Dublin Core bibliographic records, the format name appears in place of the title until you add data in field 245 (MARC) or the Title element (Dublin Core).
Variable fields	<ul style="list-style-type: none"> • Blank call number fields and other field prompts without data are printed. • For long fields, the complete text is printed, even if not fully visible in the displayed record.

Printed Content or Formatting	Description / Notes
Field 049	<ul style="list-style-type: none">• Not printed if you retrieve the record in display mode and print directly from a display view.• Once you begin editing, field 049 appears in the record and is printed.
URLs	<ul style="list-style-type: none">• The URL is printed with an underscore to indicate a link.
Controlled headings	<ul style="list-style-type: none">• Text in the controlled field is printed with an underscore to indicate a link to the authority record.
Status area	<ul style="list-style-type: none">• Included in printed record.

10 Authority record actions: keystrokes

Command shortcuts: permanent keystrokes for actions

- Connexion browser provides permanently assigned keystrokes for actions you can take on a bibliographic or authority record.
- The Command Shortcuts list includes a keystroke for every command that appears on the Edit, Action, and View lists.
- Use these keystrokes instead of
 - Selecting a command from the Edit, Action, or View list.
 - Using a customizable shortcut for the command. Note: Customizable keystrokes work in both IE and Netscape but are limited in number. For information on using these keystrokes, see the sections titled Change the action assigned to a keystroke and Keystrokes and default actions in this topic.
- Command Shortcuts are available with supported versions of Internet Explorer only.

Action	How To
Show the Command Shortcuts box above the record header	Press <Alt><K>.
Hide the Command Shortcuts box; show the Edit, Action, and View lists	Press <Alt><J>.
Show or hide the scrollbar in the Command Shortcuts box. Showing the scrollbar reduces the size of the box.	Click Show/Hide Command Scrollbar . Or Press <Alt><K> and then < > (<Shift>< >).
Use a command shortcut when the Command Shortcuts box is visible. Or show the box and use a shortcut.	Press and release <Alt><K> and then press the shortcut key for the command. Or In the Command Shortcuts box, click the command you want to use.
Use a command shortcut when the Command Shortcuts box is hidden. Do not show the box; keep the Edit, Action, and View lists visible.	Press and release <Alt><J> and then press the shortcut key for the command.

Table of command shortcuts

Action	Keystroke
Add Record	<Alt><K> and then <N>
Alternate Produce and Update	<Alt><K> and then <1>
Apply CD By Name	<Alt><K> and then <5>
Apply CD From List	<Alt><K> and then <6>
Apply Default CD	<Alt><K> and then <C>

Action	Keystroke
Back to Editing	<Alt><K> and then <L>
Cancel Changes	<Alt><K> and then <2>
Check URL Status	<Alt><K> and then <!> (<Shift><1>)
Control All Headings	<Alt><K> and then <K>
DC HTML Preview	<Alt><K> and then <%> (<Shift><5>)
DC RDF Preview	<Alt><K> and then <^> (<Shift><6>)
DC Template	<Alt><K> and then <\$> (<Shift><3>)
DC Text Area	<Alt><K> and then <&> (<Shift><7>)
Delete Constant Data Record	<Alt><K> and then <X>
Delete Holdings	<Alt><K> and then <9>
Delete Save File Record	<Alt><K> and then <X>
Derive New Constant Data Record	<Alt><K> and then <4>
Derive New Record	<Alt><K> and then <D>
Display Constant Data Record	<Alt><K> and then <T>
Display Holdings	<Alt><K> and then <H>
Display Record	<Alt><K> and then <T>
Edit Constant Data record	<Alt><K> and then <L>
Edit Record	<Alt><K> and then <L>
Export Record in DC HTML	<Alt><K> and then <*> (<Shift><8>)
Export Record in DC RDF	<Alt><K> and then <(> (<Shift><9>)
Export Record in MARC	<Alt><K> and then <E>
Flag Record	<Alt><K> and then <F>
Lock WorldCat Record	<Alt><K> and then <M>
MARC Template	<Alt><K> and then <[>
MARC Text Area	<Alt><K> and then <]>
Mark For Export	<Alt><K> and then <J>
Mark For Label	<Alt><K> and then <3>
Print Record	<Alt><K> and then <I>
Produce and Update Holdings	<Alt><K> and then <P>
Recall Submitted Record	<Alt><K> and then <<> (left angle bracket)
Reformat Record	<Alt><K> and then <R>
Release Record Lock	<Alt><K> and then <W>
Replace and Update Holdings	<Alt><K> and then <N>
Replace Record	<Alt><K> and then <A>
Report Error	<Alt><K> and then <7>

Action	Keystroke
Save Constant Data Record	<Alt><K> and then <S>
Save Record	<Alt><K> and then <S>
Set as Default Constant Data	<Alt><K> and then <G>
Show Command Lists (when Command Shortcuts box is visible)	<Alt><J> Or <Alt><K> and then
Show/Hide Command Scrollbar	<Alt><K> and then < > (<Shift>< >)
Show Command Shortcuts (when Edit, Action, and View lists are visible)	<Alt><K>
Show/Hide Functions List	<Alt><Y> Or <Alt><K> and then <=>
Show/Hide Quick Search	<Alt><Q> or <Alt><K> and then <Q>
Submit for Review	<Alt><K> and then <>> (right angle bracket)
Unedit Record	<Alt><K> and then <Z>
Unflag Record	<Alt><K> and then <F>
Update Holdings	<Alt><K> and then <U>
Validate Record	<Alt><K> and then <V>
View Authority History Record(s)	<Alt><K> and then <H>
View Authority Record	<Alt><K> and then <A>
View Label in Label Program	<Alt><K> and then <Y>

Customizable keystrokes for actions (<Ctrl><Shift> keystrokes)

- Connexion browser provides a limited set of customizable keystrokes that work in supported versions of Internet Explorer and Netscape.
- Keystrokes apply only to bibliographic records and authority records. The keystrokes are not available for other records or when using other Connexion services (for example, Express, WebDewey, Digital Archive).
- The keyboard shortcut for an action works only if
 - The action is supported in the current mode (WorldCat edit, local edit, or display).
 - And
 - You are authorized to take the action.
- The Action, Edit, and View lists (above the record view) show available actions for your current mode and authorization level.
- Sometimes a keystroke does not work because the record view is not the active frame (screen area). If a keystroke should work (the action is available and you

are authorized) but does not, click the mouse once within the record to make it the active frame. Then repeat the keystroke.

Why customize keystrokes?

- Many users find that they work more efficiently, especially while editing, if they avoid switching between the keyboard and the mouse.
- Customizing the default keystrokes lets you assign your most-used actions to the keys you find most convenient.
- You may find that the actions assigned to keystrokes are not your most-used actions. You can assign other actions that better fit your workflow.
- **Deactivate a keystroke.** You can select the [No Action] option for any keystroke to make that keystroke inactive in Connexion. Select this option to prevent conflicts with keystrokes used by other software that is active while you use Connexion.

Change the action assigned to a keystroke

	Action
1	On the General tab, under Admin Options, click Preferences .
2	At the Preferences screen, click General Options .
3	On the General Options screen, click Keystroke Shortcut Options . The Keystroke Shortcut Options screen appears.
4	To change the action assigned to a keystroke, Find the key combination you want to use in the list of default keystrokes. Open the list of available actions. Click the action you want to assign to the keystroke.
5	Review the modified key assignments. Make sure you have not assigned the same action to more than one key combination.
6	Save changes as default or use for current session only. <ul style="list-style-type: none"> • Click Save My Default or Save for Session.

Keystrokes and default actions

Action	Keystroke
Replace Record	<Ctrl><Shift><A>
Apply Default CD	<Ctrl><Shift><C>
Derive New Record	<Ctrl><Shift><D>
Export Record in MARC	<Ctrl><Shift><E>
Flag Record	<Ctrl><Shift><F>
Set as Default Constant Data	<Ctrl><Shift><G>
Display Holdings	<Ctrl><Shift><H>
Control All Headings	<Ctrl><Shift><K>
Edit Record	<Ctrl><Shift><L>

Edit Authority Records

Action	Keystroke
Lock WorldCat Record	<Ctrl><Shift><M>
Produce and Update Holdings	<Ctrl><Shift><P>
Release Record Lock	<Ctrl><Shift><Q>
Reformat Record	<Ctrl><Shift><R>
Save Record	<Ctrl><Shift><S>
Update Holdings	<Ctrl><Shift><U>
Validate Record	<Ctrl><Shift><V>
Delete Save File Record	<Ctrl><Shift><X>
Unedit Record	<Ctrl><Shift><Z>

11 Report error in bibliographic or authority record

Errors to report

- Bibliographic records

Do **not** report errors that require proof that involves examining the item you are cataloging.

For definition of errors that require proof, and detailed guidelines on reporting specific errors, see section 5.5, “Error Reporting”, in chapter 5, “Quality Assurance”, in *OCLC Bibliographic Formats and Standards*.

- Authority records

See appendix E, “Change Requests”, in the *OCLC Authorities User Guide*.

Report an error via e-mail

	Action
1	View the bibliographic or authority record for which you want to report an error.
2	On the Action list click Report Error or press <Alt><K> and then <7> (or press <Alt><J> and then <7>).
3	In the Report Error dialog box, complete the required fields at the top of the window: OCLC Symbol, User Name, and E-Mail. <ul style="list-style-type: none"> • Note: System-supplied information <ul style="list-style-type: none"> — The system inserts the OCLC symbol associated with your authorization number. — If you entered your name and e-mail address on the User Information screen, the system inserts that information to complete the required fields. — To view the User Information screen, on the General tab, under Admin Options, click User Information.
4	In the large text box, type a description of the problem. Include any information that may help OCLC staff verify the error or duplicate. For example, cite sources you consulted and identify related records.
5	(Optional) Request a copy of the e-mail message containing the error report. <ul style="list-style-type: none"> • Select the check box labeled Send a copy of the e-mail message to me.
6	Click Report Error to send the error report. <p>Result</p> Connexion sends the contents of the Report Error dialog box, and the text of the record you are viewing, to OCLC quality control staff. If requested, the system sends a copy of the message to you.

12 Review bibliographic or authority record

How record reviewing works

- Here is a high-level summary of the workflow for reviewing records.

	Action	Result or Note
1	Reviewee identifies the appropriate reviewer(s).	Determined by: <ul style="list-style-type: none"> • Training and mentoring to qualify the reviewee to participate in a cooperative program (BIBCO, NACO, SACO, CONSER) • Arrangements made within a consortium or between cooperating institutions. • Informal, individual arrangements between colleagues
2	Reviewee enters the OCLC symbols of reviewer institutions, using the Reviewer Institutions option in Cataloging Options and/or Authority Options.	To set the list of institutions as the default reviewers, click Save My Default after entering the symbols.
3	Reviewee prepares a bibliographic or authority record and submits it for review by taking the Submit for Review action.	The system saves the record with the review status Submitted .
4	Reviewee notifies reviewer that a record is available for review.	Use e-mail, telephone, or any method convenient for reviewer and reviewee.
5	Reviewer retrieves record(s) to be reviewed.	Use the Search Save File screen (bibliographic save file or authority save file). In the Review File area, click Search or press <Enter>.
6	Reviewer communicates the necessary changes to the reviewee.	Use any method acceptable to both reviewer and reviewee. Possible methods include: e-mail, telephone, fax, postal mail, and Web-based conferences.
7	Reviewee retrieves and modifies the record. Then the reviewee: <ul style="list-style-type: none"> • Resubmits the record for further review and approval. Or • Takes the appropriate final action on the record. 	To be determined by official procedures of a cooperative cataloging program or institution, or based on agreement between reviewer and reviewee.

Why submit a record for review?

- You are required to submit work for review because you are a newly authorized participant in a cooperative cataloging program.

- Although you are not required to submit work for review, you have a question about a record you created or modified.

Who can submit records for review?

Any user with a Cataloging authorization, Limited level or above, can submit records for review and/or review a record submitted to the user’s institution. Review procedures, selection of reviewers, record quality standards applied, and other details may vary depending on the program, institution, project, or other arrangement under which the review occurs.

Reviewee: Designate reviewer institutions

- Use Cataloging Options and/or Authority Options to indicate which institutions may access records you submit for review.
- Specifying a default list of reviewers is **optional**, but a default list can make submitting records for review more convenient.
- **No default reviewers specified.** If you do not specify default reviewers via Options, you must enter the appropriate symbol(s) each time you take the **Submit For Review** action. During each session, the system retains and displays the list you supplied in your most recent submittal. When you log off, the system deletes the list.
- **Default reviewers specified.** If you specify a list via Options, the system displays the default list when you take the **Submit For Review** action. You can use the default list as is, edit the list, or delete it and enter a new list. Modifications to the default list are retained for later submittals during the same session. When you log off, the system reverts to the default list. You can change the default reviewer list at any time using Cataloging Options or Authority Options.

	Action
1	On the General tab, click Admin . On the Preferences screen, click Cataloging Options or Authority Options .
2	At the Cataloging Options screen or the Authority Options screen, locate the item Reviewer Institutions . In the text box, type 1 or more OCLC symbols for institutions whose staff may access records you submit for review. Separate multiple symbols with semicolons. The system ignores spaces before or after the semicolons. You can enter institution symbols in uppercase or lowercase. The system stores them in uppercase. Examples: ABC;DEF;XYZ or ABC; DEF; XYZ or abc;def;xyz
3	Save the list of reviewer institutions as the default for future sessions or use the list for the current session only. <ul style="list-style-type: none"> • Click Save My Default or Save for Session. Note: Symbols not verified Institution symbols specified in the Reviewer Institutions option are not checked when you save the settings on the Options screen. The system checks institution symbols for reviewers only when you submit a record for review.

Reviewee: Submit a record for review

	Action
1	<p>Prepare the bibliographic or authority record you want to submit for review. For example:</p> <ul style="list-style-type: none"> • Retrieve, lock, and edit a WorldCat record. • Retrieve and edit a record. • Retrieve a previously edited record or workform from the save file. • Create a new record.
2	<ol style="list-style-type: none"> 1. On the Action list, click Submit for Review or press <Alt><K><>> (right angle bracket). 2. In the popup window, check the displayed list of reviewer institutions and edit the list if necessary. Or Type a list of OCLC symbols, separated by semicolons. Note: You can enter symbols in lowercase or uppercase. The system converts symbols to uppercase before validating them. 3. Click OK to submit the record for review. Or click Cancel if you do not want to submit the record now. <p>Results When you click OK, the system:</p> <ul style="list-style-type: none"> • Validates OCLC symbols you supplied. If any symbol is invalid, the system does not submit the record. An error message identifies the invalid symbol(s). You must retry submitting the record. When prompted, correct all invalid symbols and then click OK. • Sets the record's Review status to Submitted for Review. • For a locked WorldCat record, retains any lock on the record in WorldCat or the Authority File. • Automatically saves the record to the bibliographic save file or the authority save file. • Displays the submitted record (display mode). • Displays messages confirming that the record has been submitted and that the record has been saved. • Shows the record's save file number.

Reviewee: View your submitted records

- You can retrieve submitted records from the Show By Status screen or from the Search Save File screen.

Show By Status screen

	Action
1	On the Cataloging tab or the Authorities tab, under Show Options, click By Status .
2	On the status list screen, under Show Save File, Review Status, select the check box for the Submitted status.
3	<p>Click Show Records or press <Enter>.</p> <p>Result The system retrieves all records your institution has submitted for review.</p>

Search Save File screen

Action	
1	On the Cataloging tab or the Authorities tab, under Search Options, click Save File .
2	On the Search Save File screen, in the Save File area, select the check box labeled Submitted for Review .
3	Click Search or press <Enter>. Result The system retrieves all records your institution has submitted for review.

Reviewee: Recall submitted record

Action	
1	Retrieve the record you want to recall.
2	<ol style="list-style-type: none"> On the Action list, click Recall Submitted Record or press <Alt><K><<> (left angle bracket). Click OK to recall the record. Or click Cancel if you do not want to recall the record now. <p>Results</p> <p>When you click OK, the system:</p> <ul style="list-style-type: none"> Removes the Review status Submitted from the record. For a locked WorldCat record, retains any lock on the record in WorldCat or the Authority File. Automatically resaves the record to the bibliographic save file or the authority save file. Displays the record (display mode). Displays messages confirming that the record has been recalled and that the record has been saved. Shows the record's save file number.

Reviewer: View list of records for review

Action	
1	On the Cataloging tab or the Authorities tab, under Search Options, click Save File .

	Action
2	On the Search Save File screen, in the Review File area, type an OCLC institution symbol in the text box. Or To retrieve all records available for your review, leave the text box empty.
3	Click Search or press <Enter>. Result The system retrieves records submitted for your review by the institution whose symbol you specified. If you did not specify an institution symbol, the system retrieves all records for which your institution is designated as a reviewer. Note: Functions for reviewers Reviewers can : <ul style="list-style-type: none"> • View a submitted record in display mode (read only). • Change the record view by selecting from the View list. Reviewers cannot : <ul style="list-style-type: none"> • Edit records. • Flag records. • Take any other action. Note: Reviewee can act on a record while a reviewer views the record <ul style="list-style-type: none"> • While you are reviewing a record, the reviewee (submitter) has full access to that record. • The reviewee can recall a submitted record or delete it from the save file at any time. Your view of the record remains open, but the recalled or deleted record is not retrieved when you re-search the Review File. • The reviewee can edit the record while you are viewing it. To view the revised record, return to the Review File results screen and reopen the record. You need not repeat the search.

Reviewer and reviewee: Comments and responses

- The system does not handle communication between reviewer and reviewee.
- Review participants can use any method they wish to exchange status information, review comments, follow-up questions, and proposed revisions.
- Interactive review and revision. A reviewee can edit a submitted record while a reviewer is viewing that record. Using this functionality, reviewer and reviewee can discuss changes by phone while both view the record. Then, the reviewee can edit the record and resave it. To check the edits, the reviewer can return to a Review File results screen and reopen the record.

Reviewee: Revise record: take action or resubmit for review

	Action
1	After receiving comments from a reviewer, retrieve the record you want to revise.

Edit Authority Records

	Action
2	Revise the record to respond to corrections and suggestions from the reviewer.
3	Depending on the review procedure you are following or on direction from the reviewer, select the appropriate next step. For example: <ul style="list-style-type: none">• Take a final action on the record• Resubmit the revised record for further review• Delete the record from the save file

13 Authority record actions: display mode

Display mode and display views

- **Display mode.** You are in display mode when you have **not begun editing** a record. Display mode is in effect when you retrieve a single record or click a heading in a search results list. The record appears in MARC display view.
- **Switch to display mode from edit mode.** You switch from edit mode to display mode when you take a final action (Replace, Export, etc.), when you save a record, or when you take the Cancel Changes action.
- **MARC display view.** Display view is the same whether you select MARC or MARC Text Area in the View list.

Actions available in display mode

Action	How To
Lock WorldCat Record Or Edit Record	On the Action list, click Lock WorldCat Record or in the Edit list, click Edit Record . The system presents the record in an the selected edit view (MARC or MARC Text Area). Lock WorldCat Record. The system locks the WorldCat authority record in the OCLC Authority File. You can modify the record and then (if authorized) replace it in the WorldCat database. Edit Record. The system presents a working copy of the WorldCat authority record. You can modify the record to meet your library's needs and then export it. WorldCat record locked. If another user has locked the WorldCat authority record, the system notifies you that it is already locked and presents the record in local edit mode.
Derive New Record Not available for subject authority record	In the Edit list, click Derive New Record . The record content is redisplayed for editing. NEW appears in the OCLC: field. When you add a new record based on the derived record to the Authority File, the system supplies <ul style="list-style-type: none"> • An OCLC authority record number (ARN) • A Library of Congress control number (LCCN) • Your organization code in the 040 field
Print Record	1. On the Action list click Print Record . Or Press <F12>. 2. In the Print dialog box, click Print .

Action	How To
Report Error	<p>Report an error in a record by sending an e-mail message to OCLC quality control staff.</p> <ol style="list-style-type: none"> 1. View the authority record for which you want to report an error. 2. On the Action list click Report Error or press <Alt><K> and then <7> (or press <Alt><J> and then < 7>). 3. In the Report Error dialog box, complete the required fields at the top of the window: OCLC Symbol, User Name, and E-Mail. 4. In the large text box, type a description of the problem. 5. (Optional) To request a copy of the e-mail message containing the error report, select the check box labeled Send a copy of the e-mail message to me. 6. Click Report Error to send the error report.
Submit for Review	<ol style="list-style-type: none"> 1. Prepare the record you want to submit for review. 2. On the Action list, click Submit for Review or press <Alt><K><>> (right angle bracket). 3. In the popup window, check the displayed list of reviewer institutions and edit the list if necessary. Or Type a list of OCLC symbols, separated by semicolons. Note: You can enter symbols in lowercase or uppercase. The system converts symbols to uppercase before validating them. 4. Click OK to submit the record for review. Or click Cancel if you do not want to submit the record now. <p>Results</p> <p>When you click OK, the system:</p> <ul style="list-style-type: none"> • Validates OCLC symbols you supplied. If any symbol is invalid, the system does not submit the record. An error message identifies the invalid symbol(s). You must retry submitting the record. When prompted, correct all invalid symbols and then click OK. • Sets the record's Review status to Submitted for Review. • For a locked WorldCat record, retains any lock on the record inWorldCat or the Authority File. • Automatically saves the record to the bibliographic save file or the authority save file. • Displays the submitted record (display mode). • Displays messages confirming that the record has been submitted and that the record has been saved. • Shows the record's save file number.

Action	How To
<p>Recall Submitted Record</p>	<ol style="list-style-type: none"> 1. Retrieve the record you want to recall. 2. On the Action list, click Recall Submitted Record or press <Alt><K><<> (left angle bracket). 3. Click OK to recall the record. Or click Cancel if you do not want to recall the record now. <p>Results When you click OK, the system:</p> <ul style="list-style-type: none"> • Removes the Review status Submitted from the record. • For a locked WorldCat record, retains any lock on the record inWorldCat or the Authority File. • Automatically resaves the record to the bibliographic save file or the authority save file. • Displays the record (display mode). • Displays messages confirming that the record has been recalled and that the record has been saved. • Shows the record's save file number.
<p>Save Authority Record Save a new or existing record or resave a saved record</p>	<p>On the Action list, click Save Record. The system asks you to assign a workflow status to the record and to confirm that you want to save it. Open the list of statuses and click the status most appropriate for the record's position in your workflow. Click Yes to confirm that you want to save the record.</p> <p>Results The system presents the saved record in a display view. The save file slot number appears at the top of the screen. The record remains in the Authority Save File for 90 days. If not resaved to restart aging, it is automatically deleted.</p> <p>New record. A saved new record is deleted from the save file when you add the record to the Authority File. WorldCat record. A saved WorldCat record is deleted from the save file when you replace the record in the Authority File.Or Click No to cancel saving the record.</p> <p>Locked WorldCat record When you save a locked WorldCat record, the system places a long-term (14-day) lock on the WorldCat record in the OCLC Authority File. Other users can retrieve a copy, but cannot change the WorldCat record.</p> <p>Resave record When you resave a record, the system resets the record's age in the save file to 0 days.</p>
<p>Delete Authority Save File Record (saved records only)</p>	<p>On the Action list, click Delete Save File Record. Then click OK to confirm that you want to delete the record. Or Click Cancel to keep the record in the Connexion Authority Save File.</p> <p>Results If you click OK, the system deletes the record and displays a confirmation message. If you click Cancel, the system redisplay the record in the view you were using.</p>

Action	How To
Derive New Constant Data Record	<p>On the Edit list, click Derive New Constant Data Record. Edit the new CD record to add or revise content.</p> <p>On the Action list click Save Constant Data Record. In the dialog box, enter a name for the constant data record. Use a name that indicates the content or purpose of the constant data.</p> <p>Then click OK to add the record to your institution’s constant data database.</p>
Export Record in MARC	<p>On the Action list, click Export Record in MARC.</p> <ul style="list-style-type: none"> • Validation. By default, Connexion does not validate authority records before exporting them. For single-record exports, you can request basic or full validation. For records that fail validation, you must correct errors and then retry exporting. • For export to a file (default), the system adds the record to a file on the Connexion server. Exported records are appended to the same file until you download the file. • For TCP/IP export (direct to local system), the system exports the record immediately. <p>Note: You cannot export a new authority record (without an LCCN or ARN).</p>
View Authority History Record(s)	<p>To retrieve superseded or deleted versions of the Authority File record, on the View list, click View Authority History Record(s) or press <Alt><K> and then <H>.</p> <p>Result: Connexion searches the Authority History database for records with the same OCLC ARN. A single record or a results list appears in a new window. Authority History records are view-only; you cannot edit, save, or export the records.</p>
Flag Authority Record	<p>On the Action list, click Flag Authority Record. The record remains flagged during the current session or until you unflag it.</p>
UnFlag Authority Record	<p>On the Action list, click Unflag Authority Record.</p>

About the Authority History database

- If you retrieved this record from the Authority History database, please note the following points about the purpose of this database and the limited functionality available for using the records.
- The Authority History database permanently stores:
 - All previous, now superseded, versions of authority records distributed by the Library of Congress
 - Versions of newly added and modified records distributed to Library of Congress by OCLC NACO participants
 - Copies of current authority records sent from LC via the distribution cycle (includes all records in the Authority File)
 - Name authority records deleted by OCLC quality control staff
- Database coverage begins in the 1980’s.

About authority history records

- Records are stored and displayed in the MARC21 authorities format.
- Authority history records are view-only and always appear in display mode in the MARC Template view.
- A timestamp at the top of the record shows the date and time when the record was added to the Authority History database. (Records in the Authority File do not contain a timestamp.)
- You cannot edit, save, export, or derive new authority records from these records. You can copy text from an authority history record and then paste it into another record or document.
- Actions available on displayed authority history records are: Print Record and View Authority Record (to retrieve the current version of the record in distribution from the Authority File).
- **More?** For more information, search Help for the words **authority history**.
- Use authority history records:
 - Trace the history of a currently distributed authority record or an LCCN. For example, you might want to know when changes were made, or when a cross-reference or citation was added. Or you want to check the cancelled authority record when the distributed record contains a subfield **z** in field 010.
 - Check for headings that you can no longer find in a distributed record in the Authority File.
 - Identify changes made to a distributed authority record.
 - Determine the origin of a problem with a distributed record.

Open authority history record(s) from distributed authority record

When viewing a distributed authority record from the Authority File, you can quickly retrieve all superseded authority records that have the same OCLC ARN.

Notes on this function:

Not available from save file records. When viewing a saved authority record from the Authorities save file, the **View Authority History Record(s)** action is not available

Copy of distributed record retrieved. The Authority History database contains a copy of each distributed authority record. Therefore, your search always retrieves the same record that you were viewing from the Authority File. You may retrieve other superseded records, or only a copy of the distributed record.

Viewing a referenced record via a linked 5xx field. A referenced record viewed from a 5xx link is for display only; the **View Authority History Record(s)** action is not available. To retrieve superseded versions of the record, search for the Authority File or the Authority History database.

Action	Result
In the distributed authority record (retrieved from the Authority File), On the Action list click View Authority History Record(s) or press <Alt><K> and then <H> (or <Alt><J> and then <H>)..	The system searches for the distributed record's ARN in the Authority History database. If the search retrieves one record (a copy of the distributed authority record), the record appears in a separate window. If the search retrieves multiple records, a search results list appears in a separate window. The first record in the results list is typically a copy of the distributed authority record.

Open a distributed authority record from an authority history record

When viewing a superseded authority record (retrieved by searching or browsing the Authority History database), you can quickly retrieve the distributed authority record that has the same OCLC ARN.

Action	Result
In the authority history record (retrieved by searching or browsing the Authority History database), On the View list click View Authority Record or press <Alt><K> and then <A> (or <Alt><J> and then <A>)..	The system searches for the superseded record's ARN in the Authority File. If the search retrieves a record, the record appears in a separate window. If the distributed record has been deleted from the Authority File, you receive a message stating that no record was found. The message includes the number of authority history records available for that ARN.

Record actions summary

- The following table defines record actions and indicates the mode(s) in which each action is available for a user with the required authorization level.
- Availability of some actions depends on whether or not the record is in the Connexion Authority Save File. Other actions are not available for a new record (without an LCCN or OCLC ARN).

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Add Record (new record only) Not available for subject authority record	Add a new record to the OCLC Authority File.	NAR, NAN, ENN	Yes	No	No
Derive New Constant Data Record	Create a constant data record based on an authority record.	Limited	No	Yes	Yes
Apply CD By Name	Apply a specific constant data record by typing the CD name.	Limited	Yes	Yes	No
Apply CD From List	Retrieve and apply a stored constant data record to the authority record you are editing. Choose to apply the whole CD record, fixed field only, or variable fields only.	Limited	Yes	Yes	No
Apply Default CD	Insert content from your default constant data.	Limited	Yes	Yes	No
Back to Editing	In edit mode, return from a display view of the record to an edit view (appears in the display view only).	Limited	Yes	Yes	No
Cancel Changes	Existing record. The system redisplay the record from the Authority File, in display mode. Any locks on the record are released. New record (saved). The system redisplay the record from the Authority Save File. New record (unsaved). The system deletes the record and returns you to the Create Record screen.	Limited	Yes	Yes	No

Edit Authority Records

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Delete Save File Record (saved record only)	Remove record from the Connexion Authority Save File.	Limited	Yes	Yes	No
Derive New Record Not available for subject authority record	Create a new name authority record based on the displayed authority record or on a controlled name heading in a bibliographic record.	Limited	No	Yes	Yes
Display Record	View record as presented when first retrieved from the Authority File or Connexion Authority Save File.	Search	Yes	Yes	No
Edit Record (saved records only)	Begin editing a saved authority record (in WorldCat edit mode if therecord is locked, in local edit mode if unlocked)	Limited	Yes	Yes	Yes
Lock WorldCat Record Not available for subject authority record	Lock and modify the WorldCat copy of the record.	Limited	No	Yes	Yes
Edit Record	Modify a working copy of the record without affecting the WorldCat record.	Limited	Yes	No	Yes
Export Record in MARC (existing record only)	Store the record in a file on the Connexion server (default) or export directly to your local system via TCP/IP.	Search	Yes	Yes	Yes
Reformat Record	Refresh the edit view to reorder fields.	Limited	Yes	Yes	No
Release Lock Not available for subject authority record	Unlock a locked WorldCat authority record.	Limited	Yes	No	No

Edit Authority Records

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Replace Record (existing record only) Not available for subject authority record	Overwrite the WorldCat authority record with your modified working copy. Replace the record in the OCLC Authority File.	NAR, NAN, ENN	Yes	No	No
Report Error	Report an error in the record via e-mail.	Limited	Yes	Yes	Yes
Save Record	Place the record in the Connexion Authority Save File. Or Resave the record in the Connexion Authority Save File; restart save file aging for the record (reset to 90 days).	Limited	Yes	Yes	No
Submit for Review	Submit a record for review by colleagues at other institutions.	Limited	Yes	Yes	Yes
Recall Submitted Record	Remove Review status from a submitted record; the record is no longer available for review.	Limited	Yes	Yes	Yes
View Authority History Record(s)	Retrieve superseded or deleted versions of the Authority File record.	Search	Yes	Yes	Yes
Flag Record	Mark the record to set it aside for further use during the current session.	Search	Yes	Yes	Yes
UnFlag Record	Remove a flag from the record.	Search	Yes	Yes	Yes

Edit Authority Records

Action	What it does	Minimum Auth Level	World Cat Edit Mode?	Local Edit Mode?	Display Mode?
Unedit Record	The system redisplay the record as originally retrieved from the Authority File (for an unsaved record) or as last saved (if the record is in the Authority Save File). The record remains in the edit mode you were using. Any locks are retained.	Limited	Yes	Yes	No
Validate Record	Check the content and format of the authority record using OCLC validation rules.	Limited	Yes	Yes	No