OCLC Cataloging Authorization Levels for Record Actions and Upgrades

Authorization levels and cataloging capabilities

The logon authorization established by your OCLC cataloging profile determines the level of cataloging activities you can do. In general, with **Search** and **Limited** authorizations, you can retrieve and edit or create and save, and then export bibliographic records for use in your library's local system. With **Full and higher** authorizations, you can also create and add or edit/upgrade and replace master bibliographic records in WorldCat.

The tables in this section define authorized actions for each OCLC cataloging authorization level, from basic to highly specialized levels. Differences in authorized actions between the Connexion client and browser interfaces for Limited and Search authorizations appear in a different color.

Search authorization level

Connexion client authorized actions	Connexion browser authorized actions
• Search and display records from any OCLC database, including WorldCat, LC names and subjects authority file, and LC names and subjects history file • Export records • Display holdings • Report errors in records • Create labels • Print • Edit records locally • Save records to local save file • Search online save file • Create records for local use • Use constant data • Import records	• Search and display records from any OCLC database, including WorldCat, LC names and subjects authority file, and the LC names and subjects history file authority file • Export records • Display holdings • Report errors in records • Create labels • Print • Display local holdings **Note:** Except for saving records to the local save file (available in the client only), the last five functions listed exclusively for the client with a **Search** authorization are available in the browser with a **Limited** authorization.

Notes:
- In some circumstances, your **Search** authorization may include additional local holdings capabilities (for example, in the case of using a **Search** authorization for Resource Sharing activities).

Limited authorization level

Connexion client authorized actions	Connexion browser authorized actions
Same actions as for **Search** and the following actions: • Submit records for review • Lock records • Save records to online save file • Delete records from online save file • Validate records • Control headings **Note on maintaining local holdings records:** Although local holdings record (LHR) maintenance is available only in the browser, you can open the browser LHR maintenance interface from within the client: Click **Tools > Launch Local Holdings Maintenance**. The client opens the browser interface, automatically logs you on, and opens the local holdings maintenance screen.	Same actions as for **Search** and the following actions: • Edit records locally • Create records for local use • Use constant data • Import records • Submit records for review • Lock records • Save records to online save file • Search online save file • Delete records from online save file • Validate records • Control headings • Create and add, edit and replace, or delete local holdings records

Full authorization level

Connexion client and Connexion browser authorized actions
Same actions as for **Limited** and the following actions: • Set and delete holdings on bibliographic records • Replace master bibliographic records in WorldCat* • Add new bibliographic records to WorldCat *See section below for more about types of master record upgrades you can make.

Specialized authorization levels

Authorization level	Connexion client and Connexion browser authorized actions
NACO (Name Authority Cooperative program)	Same actions as for **Full** and the following actions: • Replace name authority records in the LC authority file • Add new name authority records to the LC authority file • Used by NACO participants to enhance national and PCC Master bibliographic records.
Agent	Same actions as for **Full** and the following actions: • Set and delete holdings on bibliographic records on behalf of other libraries for whom the agent is providing cataloging • Maintain local holdings records on behalf of other libraries
Regular Enhance	Same actions as for **Full** Used by Enhance participants to enhance non-national, non-PCC (Program for Cooperative Cataloging) master bibliographic records in authorized formats, except records for serials
Enhance National	Same actions as for **Full** and **NACO** Used by Enhance participants to enhance national and PCC master bibliographic records in authorized formats, except records for serials
Regular CONSER (Cooperative Online Serials program)	Same actions as for **Full** Used by CONSER participants to authenticate and maintain master continuing resource records
CONSER National	Same actions as for **Full** and **NACO** Used by CONSER participants to authenticate and maintain master continuing resource records

Differences between upgrading a master record and local editing

You must have a **Full, NACO, or higher** authorization to upgrade master records (that is, make permanent changes) in WorldCat or the LC authority file. With lower authorizations, you can edit locally (that is, make temporary changes) and export the records for use in your library's ILS (integrated local system). The following table gives more details:

To upgrade a master record …	Description
Edit and replace a master bibliographic or authority record	• A master record is the version of the record available to all who have cataloging access via Connexion. It does not include local data for any library. • When you lock a record (or the client locks it when you replace it), no other user can access the master record until you unlock it or edit and Replace it. However, other users can retrieve the record for local editing.

To edit a record locally …	Description
Edit a record with data for your library and export it to your library's ILS	● A locally edited record is a copy of the master record that you can make temporary changes to without affecting the master record. ● Any time you edit a record without locking or replacing it, you are making local edits. Other users can retrieve the record and edit it locally or lock and edit the master record. ● You are using local editing when you do copy cataloging.

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

Authorization level	Connexion client authorized actions …	Connexion browser authorized actions …	… for these types of records
Search or higher	● Edit record for local use (Cannot lock a record) ● Save to local save file ● Export	● Display record ● Export (Cannot edit or lock a record)	Applies to all records in WorldCat and the LC authority file.
Limited or higher	● Lock, edit locally, and save record to local or online save file (cannot Replace a master record) ● Export	● Lock, edit, and save record to online save file (cannot Replace a master record) ● Export	Applies to all records in WorldCat and the LC authority file.
Full, **NACO**, or higher	● Lock, edit, and save record ● Replace master record ● Export **Note:** In the client, neither locking nor saving the record is required before you edit and replace it. The client will lock automatically before replacing.	● Lock, edit, and save record (Must lock record before replacing it) ● Replace master record ● Export	Applies to name authority records in the LC authority file (must have a NACO authorization). Applies to the following records in WorldCat. ● Records your library contributed. ● Minimal-level records you are upgrading. ● Records you are enriching (adding call numbers, contents notes, etc.—see details in the following section).

Types of upgrades for WorldCat master records with Full, Enhance, and CONSER authorizations

About upgrading WorldCat records

- Minimal-level upgrades and database enrichment upgrades are both record enhancement capabilities that are available to all OCLC catalogers with a **Full** or higher authorization.

- Most OCLC catalogers with a **Full** or higher authorization can add data and edit certain fields of most WorldCat records of any Encoding Level and replace the master record (CONSER-authenticated serials, for example, is one exception).

- **CIP records.** You can enhance CIP (cataloging-in-progress) records, identified by the presence of ELvl:8. You can add or edit field 300 and add other database enrichment upgrades, but with the understanding that your upgrades may be replaced later by a full-level record provided by the Library of Congress or another qualified cataloging institution.

- **Make all upgrades in one editing session.** For example, add both a call number and a contents note before replacing the master record. Editing and replacing a record may prevent you from editing the master record again. For example, if you upgrade and replace a minimal-level record to I (full-level), under some circumstances, the system prevents you from replacing I-level records.

- See the complete list of types of upgrades you can make to specific types of records in OCLC Bibliographic Formats and Standards, chapter 5, "Quality Assurance," at http://www.oclc.org/ bibformats/quality/.

Summary of master record upgrades

Authorization	Upgrade type	What you can and cannot do
• Full • Enhance • CONSER	**Minimal-level upgrade** Applies to less-than-full-level records—Encoding Levels K, M, 2, 3, 4 (except field 042=*pcc*), 5, and 7)	**You can:** • Edit the entire record and upgrade it to full-level (Encoding Level I) or less-than-full-level (Encoding Level K) by replacing the record. • Add a call number or subject heading(s). **You cannot:** • For Encoding Level 4, add or modify editable fields of PCC (Program for Cooperative Cataloging) records (field 042 contains *pcc*) • Add or modify editable fields of CONSER-authenticated continuing resource records (field 042 contains code *isds/c, lc, lcac, lcd, msc, nlc, nsdp* or *premarc*)

Same as for minimal-level upgrades:
• Full
• Enhance
• CONSER
	Database enrichment
	
	Applies to any record, including Encoding Levels blank, 1, 8, I, and L, except an authenticated serial
		You can:
		• Edit only certain fields, as listed in section 5.4 "Database Enrichment" in Bibliographic Formats and Standards at: http://www.oclc.org/bibformats/en/quality/default.shtm#databaseenrichment
		• Add or edit —
		  o Class numbers for classification schemes not already in the record.
		  o Subject headings if the headings are not already in the record
		  o Field 300 in CIP (cataloging in progress) records
		  o Non-Latin script data in MARC 880 fields
		  o Field 5XX (X = any number) (can add only if field is not already present)
		  o Field 856 (can add only if field is not already present)
		• Add or modify editable fields of full-level serial records that have 10 or fewer holdings
		You cannot:
		• Modify CONSER-authenticated continuing resource records (field 042 contains a CONSER authentication code)
		Notes: You do not receive a database enrichment credit when you only control headings and replace the master record.

• Enhance	**Enhance regular and national**	• Add data or edit all non-serial records
		  o Regular: All encoding levels except blank, 1, and 4 in records with *pcc* in field 042
		  o National: All encoding levels
		• Add data or edit all print and non-print serial records not authenticated by CONSER
		Note: Your library must be authorized for the formats and may be authorized for more than one.

• CONSER	**CONSER regular and national**	• Add data or edit all print and non-print continuing resource records. • For more on the CONSER program, see OCLC Bibliographic Formats and Standards (see URL above).

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