



# NACO Training for OCLC Libraries

Prepared by  
Cooperative Programs Section & Associates

1

# NACO Administration

Prepared by the  
Cooperative Programs Section  
& Associates

2

## NACO Administration

- Questions now?
- Questions afterwards
- Information from Cooperative Cataloging Section and website

3

## Questions?

- Questions now?
- Questions after today?
  - Check documentation and training materials before asking for help
  - Discuss with other catalogers
  - If about training materials, contact trainer
  - If about NARs, contact [naco@loc.gov](mailto:naco@loc.gov) or reviewer
  - If about PCC, contact [coop@loc.gov](mailto:coop@loc.gov) Coop Cat Section, COIN

4

## **Guidelines : Information Provided**

- NACO Name Institute is administered by PCC, provided by Coop Cat Section at LC
  - Program support, documentation, training materials, communications
  - Consultation with LC Policy and Support Division
- NACO authorizations provided by OCLC

5

## **Guidelines : Review Period**

- Independence must be achieved before direct contribution to OCLC
- Reviewer will be assigned locally or regionally; otherwise, LC will review
- Review period is flexible, based on number of records

6

## Guidelines : Connexion Review Procedures

- Create NAR and submit to review file
- Notify reviewer by email (be sure to include OCLC code of library)
- Ask brief questions or cite rules in 952 (OCLC)—otherwise, use email

7

## Connexion Review Procedures : Submit for Review

The screenshot shows a library catalog interface with a 'Submit for Review' dialog box. The background interface includes a header 'ARN NEW', a table of record fields, and a list of records. The dialog box prompts the user to enter institutions for review, separated by semicolons, and includes 'OK' and 'Cancel' buttons.

Rec stat	n	Entered	20060111	Replaced
Type	z	Upd status	a	Enc Wl
Roman	■	Ref status	n	Source
Govt agn	■	Auth status	a	
Series	n	Auth/ref	a	
Ser num	n	Name	n	

040		DLC #b eng #c DLC
▶	110 2	Delaware Natural Heritage Program
▶	670	An ecological characterization of Delmarva's Great Cypress Swamp Conservation Area, 1999: #b t.p. (Delaware Natural Heritage Program)

## Guidelines : Connexion Authority Help

- OCLC documentation:  
[http://www.oclc.org/support/documentation/connexion/browser/authorities/create\\_auth\\_records/](http://www.oclc.org/support/documentation/connexion/browser/authorities/create_auth_records/)
- PCC documentation for review (browser and client use similar concepts):  
<http://www.loc.gov/catdir/pcc/naco/connexion-naco.pdf>

9

## Guidelines : Sending Records for Review

- Send both easy and tough records, no more than 10-15 at a time
- Make corrections before sending more
- Use the 952 or email for questions and comments
- Avoid overloading emails with multiple problems

10

## **Guidelines : Non-Roman Records**

- Send both NAR and surrogate pages for items
- Label them for easy matching
- Fax to reviewer or email via pdf

11

## **Guidelines : Review Objectives**

- A representative range of records (language, levels of difficulty)
- In sufficient volume
- No more than 10% error rate in areas that affect access

12

## Guidelines : After Independence

- Independent library handles its own review and quality control
- Send information to [naco@loc.gov](mailto:naco@loc.gov)
  - Update duplicate to be kept, then send information regarding duplicate to be deleted
  - Send BFM if needed (LCCNs)

13

## Guidelines : After Independence Reporting Duplicates and BFM

- Reports from OCLC make some duplicate and BFM reports unnecessary
- NACO institutions may continue to report all duplicates and BFM if that simplifies the task
- Reportable vs. non-reportable BFM document with guidelines:

<http://www.loc.gov/catdir/pcc/naco/bfmguide.html>

14

## Guidelines : After Independence Non-Reportable Duplicates

- If the heading is identical on duplicate NARs, no BFM is needed
- NACO catalogers transfer data as needed and report deletion to [naco@loc.gov](mailto:naco@loc.gov)
- OCLC periodically sends error reports to LC liaisons to delete the duplicate NAR

15

## Guidelines : After Independence Reportable Duplicates

- If the heading is NOT identical on duplicate NARs, BFM may be necessary
- NACO catalogers fix NARs, report the duplicate and the BFM to [naco@loc.gov](mailto:naco@loc.gov) as needed
- PCC specialist deletes duplicates and does BFM

16

## Guidelines : After Independence Duplicate/BFM Message

Identify which NAR to keep and which to delete and email that information to [naco@loc.gov](mailto:naco@loc.gov)

- Include both the **LCCNs** and the 1XX of the NARs
- Include the **LCCNs** for the bibliographic records as well

17

## Guidelines : After Independence Duplicate/BFM Reports

- Duplicate NAR deletion and BFM of bibliographic records must be done at LC for proper redistribution of the records
- **LC** will handle the file maintenance locally, forwarding within LC as appropriate

18

## **Guidelines : Duplicate/BFM Reports in Review Process**

- If your NACO reviewer is an LC cataloger, duplicates and BFM can be handled directly by the reviewer
- If your NACO reviewer is at another institution, you and your reviewer decide who reports deletion/BFM requests to LC Coop (naco@loc.gov)

19

## **Guidelines : Keep Work Current**

- 24-hour rule – Any record that's been in a save file for over 24 hours must have 1XX and 4XX searched again before contribution!!
- Avoid backlog in local or utility save files

20

## Guidelines : One NACO Contact

- To keep communications straight, one NACO contact at your library works with a reviewer
- Have a back-up NACO contact
- Provide continuity when staff changes

21

## Guidelines : Keep In Touch

- Let us know if problems arise
- Follow up if queries are unanswered
- NACO contact in Coop:

Carolyn Sturtevant  
202-707-4551  
[cast@loc.gov](mailto:cast@loc.gov)

Gracie Gilliam  
202-707-2250  
[ggil@loc.gov](mailto:ggil@loc.gov)

22

## Guidelines : Track Your Contributions

- Semi-annual stats on web page:  
[www.loc.gov/catdir/pcc/stats/stats.html](http://www.loc.gov/catdir/pcc/stats/stats.html)
- Monthly contribution stats are sorted by institution name
- New and changed NARs count toward annual institutional goals

23

## Guidelines : Training Resources Online

- Training materials for PCC NACO Institutes:  
<http://www.loc.gov/catdir/pcc/naco/trainees.html>
- General NACO information:  
<http://www.loc.gov/catdir/pcc/naco/naco.html>

24

## Guidelines : Subscribe to PCCList

- Announcements, policy changes, discussions
- List limited to contributing PCC libraries
- Send message to Coop to inquire subscription to PCCList: [coop@loc.gov](mailto:coop@loc.gov)

25

## Guidelines : PCC Web page

- PCC governance and programs
- Calendar
- Announcements, archives, statistics
- Documentation, FAQs, and links

<http://www.loc.gov/catdir/pcc/>

26

## **Guidelines : PCC Partners at ALA**

- PCC Participants meetings
- BIBCO/CONSER-at-Large meetings
- Workshops available
- Agendas and summaries on PCC web page

27

## **Guidelines : Other Training**

- Series workshops
- SACO workshops
- BIBCO training at your institution
- CONSER training at your institution
- Train the NACO/BIBCO/Series Trainer

28

## Evaluations

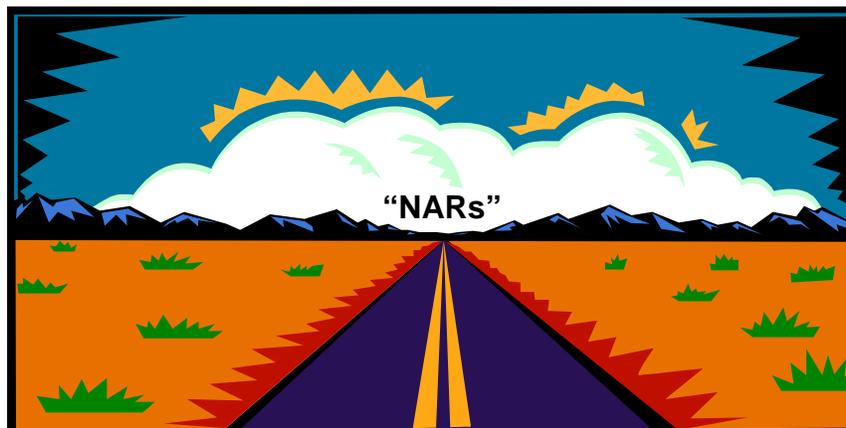
Online evaluation form

<http://www.loc.gov/catdir/pcc/naco/trainers/eval2.html>

Please do this NOW!

29

May the way be clear ...  
and the future bright!



30