

ISNI tutorial videos

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ISNI web version tutorials

We hope the following videos will help institutions get started with creating ISNIs, and answer questions for those that are already working with ISNIs. **Please note the following:**

- **Content:** Most of the content in the following videos is based on [Getting started with ISNI and the ISNI web interface](#). **Please review** the first two sections (What is ISNI? and What is an ISNI?) for helpful background that is not covered in the videos.
 - **For further information** about the topics covered, please refer to [Getting started with ISNI and the ISNI web interface](#) and the documents annotated in magenta on the [Pilot 2017-18 documentation and training](#) page.
- **Questions:** Please post questions to the [Participant questions and answers](#) page, and make sure you "watch" that page so that you will be notified when answers come in.
- **Many thanks** to Mary Jane Cuneo and Karen Carlson Young for their invaluable expertise, and to Michael Beckett for his ace video editing skills.

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Getting started, part 1 - Introduction and Overview

0:00 Introduction

0:11 Three primary databases within ISNI:

- 0:16 Public database
- 1:15 Web version
- 2:11 Client version

2:44 Logging in to web version, including browser security warning

4:01 Web display tabs and options

5:31 Search types (Any Phrase & Name)

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Getting started, part 2 - Searching

0:00 Introduction - search types

1:21 Any Phrase (APH) search - Direct order

2:08 Any Phrase (APH) search - Inverted order

2:51 Name (NA) search - Inverted order

3:11 Name (NA) search - Direct order

4:03 Search results tabs and options

4:50 Filtering options

6:41 Record display options

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Getting started, part 3 - Creating a new ISNI record

0:00 Introduction

0:12 Search database to confirm no record exists

1:32 Opening WebCat template to create new record

2:28 Name field

3:41 Identifying repeatable fields in the template

4:22 Creation role field

5:22 Work field

5:57 Related person fields

6:52 Related organisation fields

7:25 External Information fields

8:10 General note field

8:38 Save changes or Cancel

8:55 Conditions for creating full ISNI record - duplicate-matching, completeness

9:53 Re-entering credentials

10:17 Full ISNI record successfully created!

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Enhancing ISNI records, part 1

0:00 Introduction

0:26 Why enhance an ISNI?

0:59 Changing an ISNI record status from provisional to assigned

1:45 Adding source and reiterating name

3:07 Adding website information to record

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Enhancing ISNI records, part 2

0:00 Adding information to an assigned record

1:04 Adding source and reiterating name as separate step before adding further information

2:38 Adding related organization

4:00 Adding link to related organization

4:52 Adding information to record created by your institution

8:08 Corporate name changes - adding new form as a variant name

9:48 Deciding whether to add an affiliation to a name

10:55 Literary warrant - differences between NACO and ISNI

11:33 Example 1 - author

12:03 Example 2 - painter

12:57 Example 3 - person who appears in reference sources

13:28 Example 4 - person with little published information

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Enhancing ISNI records, part 3

0:00 Resolving and reporting duplicate records

0:19 Duplicates already flagged by ISNI

3:20 Duplicates not yet flagged by ISNI

6:11 Possible duplicates - ISNI equivalent to NACO 667 "Cannot identify with..." note fields

6:45 Possible duplicates identified by ISNI algorithm when saving new record

7:35 Reporting mixed identities

12:55 Errors from other sources

ISNI WinIBW tutorials

Sessions provided by Stavroula Angoura and Michael Docherty of the BL/ISNIQT on Feb. 6 and Feb. 7, 2018.

See also on the [How to use the WinIBW client](#) page:

- Documentation pertaining to these sessions in the "[WinIBW training sessions Feb. 6, Feb. 7, 2018](#)" section (sent by ISNIQT)
 - The [Documentation and How tos](#) section (prepared by John Hostage (Harvard))
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Session 1

0:00 Introduction: Michelle Durocher (Harvard)

1:37 Introduction: Michael Docherty (BL/ISNIQT)

2:14 Overview: Stavroula Angoura (BL/ISNIQT)

3:31 Part I: Searching and editing

3:49 Basic commands

- 4:20 fin ppn:
- 6:49 fin isn:
- 8:50 sca na:

11:40 Public and private data in ISNI

12:45 Part II: Merging

- (77A)
- 17:30 Merging (\dup)
- 21:10 Manual merging
- 25:20 Do not merge ("no relation")

28:45 Questions about Part II

- 28:50 Determining which records to merge
- 31:33 Safeguards to prevent incorrect merges due to typos, etc.
- 33:28 77A \$a field
- 35:35 77A repeatable field
- 36:14 Difference between fields 400 and 700 (from part I)
- 37:57 Initial articles

39:44 Part III: Upgrading record status from provisional to assigned

44:57 Questions about Part III

- 45:50 Mixed identities/records with incorrect information
- 47:13 Public screen "log in" /WinIBW login
- 48:06 Provisional to assigned "instant" change

- 48:42 Review login procedure for WinIBW

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Session 2

Note: many of the tasks shown in this session can be more easily performed using the web client.

0:00 Introduction: Michelle Durocher (Harvard)

1:10 Review of search options from session 1: Michael Docherty (BL /ISNIQT)

1:45 Browse commands: sca na: or bro: nam

3:04 Search order - direct or indirect

5:11 Use of fin: search

7:58 PCC cataloger use cases for WinIBW client vs. web version: Michelle Durocher (Harvard)

9:21 Part IV: Creating new records

9:30 Using an existing record as a guide

- 11:37 Using a [crib sheet](#) ("New record template")
 - 12:57 002 (mandatory field)
 - 14:07 008 (mandatory field)
 - 14:40 7XX (mandatory field)
 - 16:51 910
 - 17:08 671
 - 20:04 Ampersand

21:44 Saving record

- 22:01 PCC source code error message
- 25:08 Record status: 003 provisional/assigned

27:53 Questions about Part IV

- 27:55 Copying/pasting special characters/scripts
- 29:04 Definition of preferred name
- 31:55 Cataloging qualifiers in 710s
- 33:12 671 \$gr ("review status")
- 36:55 \$c qualifiers in personal names
- 38:01 Preferred name: non-Latin script/transliterated form
- 42:25 Review status in web interface
- 44:30 Indicators in 4XX/7XX
- 45:20 Note about WinIBW vs. web client

45:58 Same or different records? ISNI vs. NACO

- 49:58 Name changes: Merged institutions
- 51:58 Org A is absorbed into Org B
- 53:28 Multiple name changes

Part V: Editing

54:11 Establishing relationships (links) between records

- 55:42 personal name: 950 \$T r
[elational field](#), \$2 source code,
\$9 system #
- 58:13 corporate body: 951

Questions on relational links

- 1:05:34 List of [relationship designators](#)
- 1:07:39 Suggest relational designator [additions](#)
- 1:08:01 [Report splits](#)
- 1:08:42 Error Info button
- 1:10:50 Entry order of fields