

Take Actions on Bibliographic Records

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Revision History

Date	Section title	Description of changes
April 2006	1. Actions: edit mode; 2. Actions: keystrokes; 4. Set holdings; 12. Actions: display mode	Revised to reflect changed and added functionality for maintaining local holdings records.
November 2006	1. Actions: edit mode; 2. Actions: keystrokes; 12. Actions: display mode	Documented new function Display Find in a Library that displays Find In a Library screen of the WorldCat.org service. Use the screen to locate WorldCat libraries that hold the item. You can also access supplemental materials such as cover art and user reviews via this screen.
	8. Replace master records	Revised to reflect expanded capabilities for users with Full level authorizations to upgrade records to control headings or (using Connexion client) to add non-Latin script.
July 2008	8. Replace master records 1. Actions edit mode; 4. Set holdings; 12. Actions display mode	Revised to reflect changes implemented with the 2008 MARC update. Updated to clarify meaning of upper- or lowercase letters in library symbols in basic holdings lists.
April 2012	1. Actions: edit mode; 2 Actions: keystrokes; 6. Print records 12. Actions: display mode	Revised to remove “and DDC” from the Control All Headings command. The command no longer includes DDC numbers. Connexion does not control DDC numbers.

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1 Bibliographic record actions: edit modes

Edit modes and edit views

- **Edit mode.** You are in edit mode (copy cataloging mode) when you use the **Edit Record** action to begin editing the record. The master record is not locked in WorldCat.
- **Master edit mode.** You are in master edit mode when you use the **Lock Master Record** action to begin editing a record. The master record is locked in WorldCat.
- **MARC edit views.** MARC Template or MARC Text Area
- **Dublin Core edit views.** DC Template or DC Text Area
- **Display view in edit mode.** While in master 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 click the **Display** button for a record in a search results list. The record appears in a display view for the current format (MARC or Dublin Core).
- **Switch to display mode from edit mode.** You switch from edit mode to display mode when you save a record or take the Cancel Changes action.

Actions available in edit mode

Action	How To
Display record	On the Edit list, click Display Record . The record appears in a display view for the current format (MARC or Dublin Core).
Reformat record	On the Edit list, click Reformat Record . MARC. Reformatting arranges fields in (approximate) ascending tag number order; same order used in standard WorldCat record displays. Dublin Core. Elements are arranged so that Title and Description appear first.
Validate record	On the Edit list, click Validate Record or press <Alt><K>, <V>. 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 (template edit views) or above the text area (text area edit views). The Validate Record action applies OCLC WorldCat validation rules.
Print Record	1. On the Action list click Print Record . Or Press <F12>. 2. In the Print dialog box, click Print .

Action	How To
Control All Headings (authority control for all controllable headings)	<p>On the Edit list, click Control All Headings.</p> <p>The system displays a message explaining the limitations of the Control All function. Click OK to clear the message and continue</p> <p>The system attempts to apply authority control to all controllable headings in the record (personal/corporate names or subject headings).</p> <p>Note: Control All works only for headings that exactly match a heading in the Authority File. You must control other headings individually using the Control option in the functions list for the heading field.</p>
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 bibliographic 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 master 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.

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 master 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.
<p>Save record Save a new or existing record or resave a saved record</p>	<p>On the Action list, click Save Record.</p> <p>Assign a workflow status appropriate for the record's position in your cataloging workflow. If desired, enter a note or identifier in the My Status text box.</p> <p>Click Yes to add the record to the save file. The system saves the record and displays the save file number for the record. Or click No to cancel saving the record.</p> <p>Locked master record. When you save a locked master record, the system places a long-term (14-day) lock on the master record in the Resource Catalog and in WorldCat. Other users can retrieve a copy, but cannot change the master record.</p> <p>Resave record. When you resave a record, the system resets the records age in the save file to 0 days.</p>
<p>Delete record from save file (saved records only)</p>	<p>On the Action list, click Delete Save File Record. Then click Yes or Yes, Wait for response to confirm the action. Or click No to cancel deleting the record. The system deletes the record from the bibliographic save file.</p>
<p>Derive New Record (Derive a new record from an existing record or a workflow)</p>	<ol style="list-style-type: none"> 1. On the Edit list click Derive New Record or press <Alt><K> and then <D> (or <Alt><J> and then <D>). 2. When the system asks whether you want to transfer fixed-field values to the new record, <ul style="list-style-type: none"> — Click Yes to transfer all fixed-field values except the OCLC control number, Rec Stat, Entered, and Replaced. Rec Stat is set to Q (New). Both Entered and Replaced are set to the current date, — Click No to transfer only default fixed-field values for the format, as indicated by the value in the Type element. — Click Cancel to cancel deriving a new record. <p>Results The system displays the content of the new record. Variable fields transfer based on your settings for the Derive Record Fields option (Cataloging Options screen). NEW appears in place of an OCLC control number.</p>

Action	How To
Cancel changes to record	<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 the record.</p> <p>Results Existing record. The system redisplay the record from WorldCat, in display mode. Any locks on the record are released. New record (saved). The system redisplay the record from the bibliographic save file. New record (unsaved). The system deletes the record and returns you to the Create Record screen.</p>
Unedit Record	<p>On the Edit list, click Unedit Record. The system redisplay the record as originally retrieved from WorldCat (for an unsaved record) or as last saved (if the record is in the save file). The record remains in the edit mode you were using. Any locks are retained.</p>
Release Record Lock	<p>Master edit mode only.</p> <p>On the Action list, click Release Record Lock.</p> <p>Results</p> <ul style="list-style-type: none"> • The master record is unlocked in WorldCat. • Changes you made while the record was locked are retained in your working copy. • You switch to local edit mode.
Replace master record	<p>On the Action list, click Replace Record or Replace and Update Holdings. The system prompts you to confirm that you want to replace the master record. Click Yes to continue and replace the master record.</p> <p>Results</p> <ul style="list-style-type: none"> • Connexion validates the record. If the system reports validation errors, correct them and retry replacing the record. • When the record is valid, Connexion replaces it in WorldCat and sets your holdings if you took the Replace and Update Holdings action. • The system notifies you that the record has been replaced. The master record is unlocked. • Your copy of the record is displayed in local edit mode. Local data fields you added to the record are retained in your copy. <p>To cancel replacing the record, click No. If you cancel, the system redisplay the record for further editing.</p>

Action	How To
<p>Update Holdings (link your library's OCLC symbol to the record)</p>	<p>On the Action list, click Update Holdings. The system asks you to confirm the action. Click OK to set holdings. Or click Cancel to cancel the action.</p> <p>Results</p> <ul style="list-style-type: none"> • Validation: existing records. By default, Connexion does not validate bibliographic records automatically when you update holdings. You can request basic or full validation. For records that fail validation, you must correct errors and then retry the Update Holdings action. • Validation: new records. Connexion validates the record before adding it to WorldCat. If the system reports validation errors, correct them and retry adding the record. • When the record is valid, Connexion sets your holdings; your institution's OCLC symbol is associated with the record. For a new record, the system adds the record to WorldCat and assigns an OCLC control number. • Your copy of the record is displayed in local edit mode. Local data fields you added to the record are retained in your copy. <p>Note: You can also set holdings when you replace a record. Use Replace Record or Replace and Update Holdings as appropriate.</p>
<p>Produce and Update Holdings MARC view only (Not available for locked master record)</p>	<p>Local edit mode only (not available for locked master record). MARC Template edit view only.</p> <p>On the Action list, click Produce and Update Holdings. The system asks you to confirm the action. Click OK to continue. Or click Cancel to cancel the produce action.</p> <p>Results</p> <ul style="list-style-type: none"> • Validation: existing records. By default, Connexion does not validate bibliographic records automatically when you update holdings and produce offline products. You can request basic or full validation. For records that fail validation, you must correct errors and then retry the action. • Validation: new records. Connexion validates the record before adding it to WorldCat. If the system reports validation errors, correct them and retry adding the record. • For a new record, adds the record to WorldCat and assigns an OCLC control number. • Sets holdings for your library. • Adds your library's institution symbol to field 040. • Sends appropriate information to create offline products including catalog cards, accessions lists, and records in an electronic file or on magnetic tape. Delivery of products depends on the your profile. • Creates an archive record that reflects any changes you made while editing the record. • Redisplays the record in local edit mode. A confirmation message appears at the top of the record. Local data fields you added to the record are retained in your copy. • In the record, sets the Produce action status to C (Completed).

Action	How To
<p>Alternate Produce and Update MARC view only (Not available for locked master record)</p>	<p>Local edit mode only (not available for locked master record). MARC Template edit view only. On the Action list, click Alternate Produce and Update. The system displays the Alternate Produce Options dialog box. Specify the alternate produce options you want to apply:</p> <ul style="list-style-type: none"> • In the Extra Cards text box, type the number of extra cards for the receiving catalogs for the first holding library listed in field 049, subfield \$a. Enter a number from 1 to 255. • Select the Ad Produce check box to order cards for the receiving catalogs for the first holding library listed in field 049, subfield \$a of the record. • Select the All Produce check box to order cards for the receiving catalogs for all holding libraries listed in field 049, subfield \$a of the record. <p>Click Produce to continue. Or click Cancel to cancel the alternate produce action.</p> <p>Results</p> <ul style="list-style-type: none"> • Validation: existing records. By default, Connexion does not validate bibliographic records automatically when you update holdings and produce offline products. You can request basic or full validation. For records that fail validation, you must correct errors and then retry the action. • Validation: new records. Connexion validates the record before adding it to WorldCat. If the system reports validation errors, correct them and retry adding the record. • For a new record, adds the record to WorldCat and assigns an OCLC control number. • Sets holdings for your library. • Adds your library's institution symbol to field 040. • Sends appropriate information to create offline products including catalog cards, accessions lists, and records in an electronic file or on magnetic tape. Delivery of products depends on the your profile. • Sends information to the catalog card production system to generate the cards specified using alternate produce options. • Creates an archive record that reflects any changes you made while editing the record. • Redisplays the record in local edit mode. A confirmation message appears at the top of the record. Local data fields you added to the record are retained in your copy. • In the record, sets the Produce action status to C (Completed).

Take Actions on Bibliographic Records

Action	How To
Create Local Holdings	<p>1. On the Action list click Create Local Holdings or press <Alt><K> and then <+>(plus sign) (or <Alt><J> and then <+>).</p> <p>2. In the local holdings workform, enter content to describe your holdings for the item. Edit the Summary field to reflect any changes in your institution's overall holdings for the item. Apply local holdings constant data if appropriate.</p> <p>3. In the new local holdings record, on the Action list click Add Record or press <Alt><K> and then <N> (or <Alt><J> and then <N>).</p> <p>Results</p> <ul style="list-style-type: none"> • Connexion validates the record. If the system reports validation errors, correct them and then try again to add the record. • When the record is valid, Connexion links it to the bibliographic record. • When you add your first LHR to a bibliographic record, Connexion sets your institution-level holdings, if not already set. • The added record reappears in display mode.
Delete Holdings	<p>On the Action list, click Delete Holdings. The system asks you to confirm that you want to delete holdings. Click OK to delete holdings. Or click Cancel to cancel the action.</p> <p>Local holdings records. If you have local holdings records attached to the record, the system asks you to confirm that you want to delete local holdings. Click Yes to delete LHRs and your holdings symbol or click No to return to the record. When you confirm that you want to delete holdings (and/or LHRs), the system displays a confirmation message.</p> <p>Your institution's OCLC symbol is no longer linked to the record. Note: The Delete Holdings action is available only if your library's OCLC symbol is attached to the record.</p>

Action	How To
Delete All Local Holdings	<ol style="list-style-type: none"> 1. Open the bibliographic record from which you want to delete all local holdings records and remove your institution's symbol. 2. On the Action list click Delete All Local Holdings or press <Alt><K> and then <-> (hyphen) (or <Alt><J> and then <->). 3. Above the record, Connexion asks you to confirm whether you want to delete all your LHRs and whether you also want to remove your institution's holdings symbol. 4. Confirm or cancel the action: <ul style="list-style-type: none"> — Delete all LHRs and holdings symbol. Select the Remove your institution's symbol from bibliographic record check box and then click Delete Local Holdings. — Delete LHRs, retain your institution's symbol. Clear (uncheck) the Remove your institution's symbol from bibliographic record check box and then click Delete Local Holdings. — Cancel deleting all LHRs. Click Cancel if you decide to keep your existing LHRs and retain your holdings symbol attached to the bibliographic record. <p>Results</p> <ul style="list-style-type: none"> • Delete all LHRs and symbol. Connexion deletes the LHRs and your institution's symbol from the record. A confirmation message states that your holdings were deleted and gives the number of LHRs deleted. • Delete LHRs, retain symbol. Connexion deletes the LHRs and displays a confirmation message that gives the number of LHRs deleted.

Action	How To
Display Holdings	<p>1. On the View list click Display Holdings or press <Alt><K> and then <H> (or <Alt><J> and then <H>).</p> <p>2. In the Display Holdings box (above the record header), click Display Holdings or press <Enter> to view the Default Holdings. Or Open the list and select the type of holdings display you want: All Holdings or Regional Holdings or State Holdings.</p> <p>3. Then click Display Holdings or press <Enter>. The Holdings Display window lists the holdings you requested. When finished viewing holdings, click Close Window. Note: The Holdings Display window closes automatically when you choose another command or navigate to another screen.</p> <p>Print holdings list (Internet Explorer only).</p> <ol style="list-style-type: none"> Right-click in the Holdings Display window. On the popup menu click Print. In the Print dialog box, click OK or press <Enter>. <p>Identify listed institutions</p> <p>Show institution name (Holdings Display window)</p> <ul style="list-style-type: none"> In the locations listing, move the mouse pointer over an institution symbol to display the name of the institution. <p>Library symbols in lists. In holdings lists, letters in institution symbols appear in uppercase or lowercase. An uppercase symbol indicates that the institution participates in the WorldCat Resource Sharing service as a lender of library materials. A lowercase symbol indicates that the institution does not lend materials via WCRS. Users creating a loan request in WCRS can include uppercase symbols in the list of potential lenders.</p>
Display Local Holdings	<ol style="list-style-type: none"> On the View list, click Display Local Holdings or press <Alt><K><\> (backslash) (or <Alt><J> and then <\>). In the Local holdings type list, select the display to view: For Institution Holdings or Group Holdings, type the institution or group symbol in the text box. Or select State Holdings, Region Holdings, Default Holdings, or All Holdings. Click Display Local Holdings. <p>Results</p> <p>The Holdings Display window lists summary local holdings for an institution or group, or for institutions in the category you selected (state, region, default, all). In the Holdings Display window, under Local Holdings Information, click the link to the holdings summary for the institution you want.</p>
Edit Local Holdings	<p>Note: Available only if your institution has one or more LHRs linked to the bibliographic record.</p> <p>On the Action list, click Edit Local Holdings or press <Alt><K><_> (underscore) (or <Alt><J> and then <_>).</p>

Action	How To
Display Find in a Library	<p>On the View list, click Display Find in a Library or press <Alt><K> and then <8> (or <Alt><J> and then <8>).</p> <p>Result: Connexion displays the Find in a Library[®] service at WorldCat.org in a new window. Use the screen to locate WorldCat libraries that hold the work described in the current record and to link directly to library OPACs. You can also access cover art, information on alternative formats (large print, audiobooks, etc.), user reviews and other evaluative content.</p>
Apply CD By Name	<ol style="list-style-type: none"> 1. Retrieve the bibliographic 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 bibliographic 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>On the Edit list, click Apply Default CD or press <Alt><K> and then <C>.</p> <p>The system merges your default constant data with the record you are editing.</p> <p>MARC only: 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. To change the setting for this option, edit your default constant data. On the Cataloging tab, under Show Options, click Default CD. Your default constant data appears in edit mode.</p>

Action	How To
<p>Derive New Constant Data Record</p>	<ol style="list-style-type: none"> On the Edit list click Derive New Constant Data Record or press <Alt><K> and then <4> (or <Alt><J> and then <4>). When the system asks whether you want to transfer fixed-field values to the new CD record, <ul style="list-style-type: none"> Click Yes to transfer all fixed-field values except Entered and Replaced. (Note: Both Entered and Replaced are set to the current date.). Click No to transfer only default fixed-field values for the format, as indicated by the value in the Type element. Click Cancel to cancel deriving a new CD record. <p>Results The system displays the content of the new constant data record. Variable fields transfer based on your settings for the Derive Record Fields option (Cataloging Options screen).</p> <p>Complete new CD record</p> <ol style="list-style-type: none"> 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>Export record</p>	<ul style="list-style-type: none"> On the Action list click Export Record in MARC or Export Record DC HTML or Export Record DC RDF. Or MARC. Press <Alt><K> and then <E>. DC HTML. Press <Alt><K> and then <*>. DC RDF. Press <Alt><K> and then <(>. <p>Results</p> <ul style="list-style-type: none"> Validation. By default, Connexion does not validate bibliographic 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. The system changes the record's Export status to C (Completed) or F (Failed).
<p>Mark For Export</p>	<ol style="list-style-type: none"> Before or after saving a record you plan to export, on the Action list click Mark for Export or press <Alt><K> and then <J>. The record's Export status changes to R (Ready). Note: You can have the system save a record automatically when you use Mark for Export. On the Export Options screen, set the Mark for Export and Save Record option to On (default is Off) When ready to export a group of saved records, search the save file for records with the Export status Ready. Flag the records and then take the Export Flagged Records action.

Action	How To
<p>View Label in Label Program MARC view only (Not available for locked master record)</p>	<p>Requires that you install the OCLC Cataloging Label Program (version 1.22 or later) on your workstation.</p> <ol style="list-style-type: none"> 1. Retrieve the bibliographic record for which you want to print labels. 2. Edit the record as you wish. For example: add or modify a call number, add an input stamp in the 049 field, or edit text in author (1xx) or title (245 \$a) fields. 3. On the View list, click View Label in Label Program or press <Alt><K> and then <Y>. <p>Results</p> <ul style="list-style-type: none"> • The system extracts data from the record and downloads the text to your workstation. • The OCLC Cataloging Label Program starts automatically (if it is not already running). • The Label Program displays the label set using the label format you specified in Connexion Cataloging Options. • In the record, the system sets the Label action status to C (Completed).
<p>Mark For Label</p>	<ol style="list-style-type: none"> 1. Before or after saving a record for which you plan to create labels, on the Action list click Mark for Label or press <Alt><K> and then <3>. The record's Label status changes to R (Ready). Note: You can have the system save a record automatically when you use Mark for Label. On the Cataloging Options screen, set the Mark for Label and Save Record option to On (default is Off) 2. When ready to create labels for a group of saved records, search the save file for records with the Label status Ready. 3. Flag the records and then take the Create Labels for Flagged Records action.
<p>Lock Master Authority Record for name heading Controlled name heading fields only</p>	<p>MARC only Not available in Dublin Core template view.</p> <p>Move to the name heading field for which you want to edit the linked master authority record.</p> <p>In the Functions list click Lock Master Authority.</p> <p>The system retrieves and locks the master authority record for the name heading. The record appears in a new browser window, in master edit mode, using your default edit view for authority records (MARC or MARC Text Area).</p>
<p>Edit Authority Record for name heading Controlled name heading fields only</p>	<p>MARC only Not available in Dublin Core template view.</p> <p>Move to the name heading field for which you want to locally edit the linked authority record.</p> <p>In the Functions list click Edit Authority Record.</p> <p>The system retrieves the authority record for the name heading. The record appears in a new browser window, in local edit mode, using your default edit view for authority records (MARC or MARC Text Area).</p>

Action	How To
<p>Derive New Authority Record from record for name heading Controlled name heading fields only</p>	<p>MARC only Not available in Dublin Core template view. Move to the controlled name heading field you want to use to create a new name authority record by cloning. In the Functions list click Derive New Authority. The Derive Authority function</p> <ul style="list-style-type: none"> • Retrieves the linked record from the Authority File. • Transfers selected content and/or supplies default fields/values to produce a new record based on the cloned record. • Presents the resulting record in local edit mode. • Inserts 1 (: in the OCLC: field in place of an OCLC authority record number (ARN). <p>The resulting workform appears a new browser window in local edit mode, using your default edit view for authority records (MARC or MARC Text Area).</p>
<p>Generate Authority Record for name heading Uncontrolled or controlled name heading fields</p>	<p>MARC only Not available in Dublin Core template view. Move to the name heading field you want to use to generate a new name authority record. Headings you can use</p> <ul style="list-style-type: none"> • 100, 110, 111, 130, 240, 440, • 600, 610, 611, 630, 651 • 700, 710, 711, 730 • 800, 810, 811, 830 <p>In the Functions list click Generate Authority. The Generate Authority function</p> <ul style="list-style-type: none"> • Extracts appropriate elements from the selected field and supplies new tags and subfields or removes them as needed. • Rearranges and adds the data from the bibliographic record to a name authority workform in the following order: <ul style="list-style-type: none"> — Fixed field — 040 with default MARC Organization Code (NUC symbol) — 022 (if any) — 1xx — 4xx (if any) — 642-646 (if any) — 670 • Supplies 1 (: in the OCLC: field in place of an OCLC authority record number (ARN). <p>The resulting workform appears a new browser window in local edit mode, using your default edit view for authority records (MARC or MARC Text Area).</p>
<p>Flag record</p>	<p>On the Action list, click Flag Record. The record remains flagged during the current session or until you unflag it. Note: You cannot flag a record retrieved from WorldCat. You can save the record and flag it in the save file. Note: You cannot flag a new record (not yet added to WorldCat, no OCLC control number).</p>
<p>Unflag record</p>	<p>On the Action list, click Unflag Record.</p>

Take Actions on Bibliographic Records

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 bibliographic save file. Other actions are not available for a new record (without an OCLC control number).
- The hierarchy of authorizations from least to most record actions included is as follows:
 - Search
 - Limited
 - Full
 - Authorizations for those who participate in special projects or services, such as NACO (Name Authority Cooperative), Enhance, or CONSER (Cooperative Online Serials) program.

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Update Holdings (add new record)	Add a new record to WorldCat and add your library's OCLC symbol.	Full	Yes	No	No
Derive New Constant Data Record	Add a copy of the record to your institution's constant data database.	Limited	No	No	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 bibliographic 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

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Cancel Changes	<p>Existing record. The system redisplay the record from WorldCat, in display mode. Any locks on the record are released.</p> <p>New record (saved). The system redisplay the record from the bibliographic 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
Control All Headings	Add authority control for all controllable fields in the record.	Limited	Yes	Yes	No
Create Local Holdings	Link a new local holdings record to the bibliographic record.	Full	No	Yes	No
Delete Holdings (if library has holdings)	Remove your library's OCLC symbol from the record.	Full	No	Yes	No
Delete All Local Holdings	Remove any LHRs your library has linked to the record. Option to delete your OCLC symbol from the record.	Full	No	Yes	No
Delete Save File Record (saved record only)	Remove record from the bibliographic save file.	Limited	Yes	Yes	No
Derive New Record	Create a new record based on the current record.	Limited	No	Yes	Yes
Display Holdings	View a list of libraries whose OCLC symbols are attached to the record.	Search	Yes	Yes	Yes
Display Local Holdings	View a list of libraries that have local holdings records attached to the record.	Search	Yes	Yes	Yes

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Display Record	View record as presented when first retrieved.	Search	Yes	Yes	No
Edit Local Holdings	Edit local holdings record(s) your library has attached to the record.	Full	No	Yes	No
Edit Record (saved records only)	Begin editing a saved record (in master edit mode if the record is locked, in local edit mode if unlocked)	Limited	Yes	Yes	Yes
Edit Record	Modify a working copy of the record without affecting the master record.	Limited	Yes	No	Yes
Export Record in [MARC, DC, etc.] (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
Lock Master Record	Lock and modify the master copy of the record.	Limited	No	Yes	Yes
Mark for Export	Indicate a record is ready to export.	Limited	Yes	Yes	No
Mark for Label	Indicate a record is ready for use to create labels.		No	Yes	No
Reformat Record	Refresh the edit view to reorder fields.	Limited	Yes	Yes	No
Release Record Lock	Unlock a locked master record. Retain changes made while editing. Switch to local edit mode.	Limited	Yes	No	No
Replace Record (existing record only)	Overwrite the master record with your modified working copy. (Only for specific records and purposes, as defined by your authorization.)	Full	Yes	No	No

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Replace and Update Holdings (existing record only)	Replace the master record and add your library's OCLC symbol. (Only for specific records and purposes, as defined by your authorization.)	Full	Yes	No	No
Report Error	Report an error in the record by via e-mail.	Limited	Yes	Yes	Yes
Save Record	Place the record in the bibliographic save file. Or resave the record in the save file; restart save file aging for the record.	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
Flag Record	Mark the record to set it aside for further use during the current session.	Search	Yes	Yes	Yes
Unedit Record	The system redisplay the record as originally retrieved from WorldCat (for an unsaved record) or as last saved (if the record is in the save file). The record remains in the edit mode you were using. Any locks are retained.	Limited	Yes	Yes	No
UnFlag Record	Remove a flag from the record.	Search	Yes	Yes	Yes
Update Holdings	Add your library's OCLC symbol to the record.	Full	No	Yes	No

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Validate Record	Check the content and format of the record using OCLC WorldCat validation rules.	Limited	Yes	Yes	No
View Label in Label Program (Requires Label Program 1.22 or later installed on workstation)	Display a label set for the current record in the OCLC Cataloging Label Program.	Limited	No	Yes	Yes

2 Bibliographic 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 **Change the action assigned to a keystroke** and **Keystrokes and default actions**.
- 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>
Back to Editing	<Alt><K> and then <L>

Take Actions on Bibliographic Records

Action	Keystroke
Cancel Changes	<Alt><K> and then <2>
Control All Headings	<Alt><K> and then <K>
Create Local Holdings	<Alt><K> and then <+> (plus sign)
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 All Local Holdings	<Alt><K> and then <-> (hyphen)
Delete Holdings	<Alt><K> and then <9>
Delete Local Holdings	<Alt><K> and then <X>
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 Find in a Library	<Alt><K> and then <8>
Display Local Holdings	<Alt><K> and then <\> (backslash)
Display Holdings	<Alt><K> and then <H>
Display Record	<Alt><K> and then <T>
Edit Constant Data record	<Alt><K> and then <L>
Edit Local Holdings	<Alt><K> and then <_> (underscore)
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 Master 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>

Take Actions on Bibliographic Records

Action	Keystroke
Replace and Update Holdings	<Alt><K> and then <N>
Replace Record	<Alt><K> and then <A>
Report Error	<Alt><K> and then <7>
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 Label in Label Program	<Alt><K> and then <Y>
View Group Summary	<Alt><K> and then <G>

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 (such as pathfinders or) 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 (master 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.

Take Actions on Bibliographic Records

	Action
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>
Lock Master 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>

3 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.	

Take Actions on Bibliographic 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.
Export Record in MARC	Default setting. By default, Connexion does not validate exported authority records. Validation level set: If you select Basic or Full validation for single-record exports, Connexion does the specified level of validation.

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 master record, Connexion always performs full validation.</p>

	Action
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).

4 Set holdings for bibliographic record

Why set holdings for a bibliographic record?

- Maintain your holdings in WorldCat and your archive records at OCLC.
- Associate the record with your library; for example, because you have added the record to a local catalog or incorporated it into a pathfinder.
- **Note:** You can also set holdings when you add a new record or replace a record. Use **Update Holdings** or **Replace and Update Holdings** as appropriate.

Set holdings (Update Holdings): copy cataloging

	Action
1	<p>1. On the Action list click Update Holdings or press <Alt><K> and then <U>.</p> <p>2. Click OK to confirm that you want to set holdings.</p> <p>Or</p> <p>Click Cancel to cancel the action.</p> <p>Result</p> <ul style="list-style-type: none"> • By default, Connexion does not validate the record when you take the Update Holdings, Produce and Update Holdings, or Alternate Produce and Update action on an existing bibliographic record. If you select Basic or Full validation for actions that set holdings, Connexion does the specified level of validation. • 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 updating holdings. • The system displays a confirmation message. • Your institution's OCLC symbol is associated with the record. • Note: Saved record deleted after Update If you retrieved the record from the bibliographic save file, the system deletes the record from the save file after a successful Update Holdings transaction. Resave the record if you need to keep it in the save file for further processing.

Add new bibliographic record to WorldCat

	Action
1	<p>Retrieve the record you want to add from the bibliographic save file.</p> <p>Or</p> <p>Complete editing on an unsaved new record.</p>
2	View the full record.
3	<p>If appropriate, apply constant data to the new record.</p> <ul style="list-style-type: none"> • On the Edit list click Apply Default CD or press <Alt><K> and then <C> to apply your default constant data. Or • On the Edit list click Apply CD By Name (or press <Alt><K> and then <5>) or Apply CD From List (or press <Alt><K> and then <6>) to apply a specific constant data record.

	Action
4	<p>Prevent duplicate records</p> <ul style="list-style-type: none"> • Search WorldCat again immediately before adding the new record verify that no other user has created a record for the resource since you began working on your record.
5	<p>Add the new record to WorldCat.</p> <ul style="list-style-type: none"> • If you find no existing record, on the Action list click Update Holdings or press <Alt><K> and then <U> (or <Alt><J> and then <U>). <p>Result</p> <ul style="list-style-type: none"> • Connexion validates the full record automatically when you add a new record to WorldCat. • 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 adding the record. • When the record is valid, Connexion adds it to WorldCat, sets your holdings, and assigns an OCLC control number. • Your copy of the record is displayed in local edit mode. Local data fields you added to the record are retained in your copy. • Note: Saved record deleted after add If you retrieved the new record from the bibliographic save file, the system deletes the record from the save file after adding it to WorldCat. Resave the record if you need to keep it in the save file for further processing.

Delete Holdings

The first time you use a record for cataloging, Connexion links your OCLC symbol to the bibliographic record. Your OCLC symbol appears in holdings messages in records and in locations displays retrieved via Display Holdings. Delete Holdings unlinks your OCLC symbol from a record. Use this action when you no longer hold the item or if you inadvertently linked your OCLC symbol to the wrong record.

The Delete Holdings action is available only if your library's OCLC symbol is attached to the record.

If you know that you need to delete all your local holdings records for an item, and also remove your institution's symbol, you can complete both tasks by taking the **Delete All Local Holdings** action.

	Action
1	<p>On the Action list click Delete Holdings or press <Alt><K> and then <9> (or <Alt><J> and then <9>).</p> <p>The system asks you to confirm that you want to delete holdings.</p> <ul style="list-style-type: none"> • Click OK to remove your holdings. • Or click Cancel to cancel the action.
2	<p>Local Holdings Records.</p> <ul style="list-style-type: none"> • If you have local holdings records attached to the record, the system asks you to confirm that you want to delete LHRs. Click Yes to delete LHRs and holdings or click No to return to the record. <p>Result</p> <ul style="list-style-type: none"> • When you confirm that you want to delete holdings (and/or LHRs), the system displays a confirmation message. • Your institution's OCLC symbol is no longer associated with the record.

Take Actions on Bibliographic Records

Display Holdings

Use the Display Holdings action to list libraries whose OCLC symbols are linked to a bibliographic record.

Use **Display Local Holdings** to view LHRs created by another library or by libraries in a group, a state, or a region.

	Action
1	<ol style="list-style-type: none"> 1. On the View list click Display Holdings or press <Alt><K> and then <H> (or <Alt><J> and then <H>). 2. In the Display Holdings box (above the record header), click Display Holdings or press <Enter> to view the Default Holdings. Or Open the list and select the type of holdings display you want: All Holdings or Regional Holdings or State Holdings. 3. Then click Display Holdings or press <Enter>. The Holdings Display window lists the holdings you requested. When finished viewing holdings, click Close Window. Note: The Holdings Display window closes automatically when you choose another command or navigate to another screen.
2	<p>Print holdings list (Internet Explorer only).</p> <ol style="list-style-type: none"> 1. Right-click in the Holdings Display window. 2. On the popup menu click Print. 3. In the Print dialog box, click OK or press <Enter>.

Holdings lists

Library symbols in lists. In holdings lists, letters in institution symbols appear in uppercase or lowercase. An uppercase symbol indicates that the institution participates in the WorldCat Resource Sharing service as a lender of library materials. A lowercase symbol indicates that the institution does not lend materials via WCRS. Users creating a loan request in WCRS can include uppercase symbols in the list of potential lenders.

List type	Description
All	All OCLC symbols linked to the record
State	Symbols of libraries in the U. S. state, Canadian province, or country in which your library is located.
Region	Symbols of libraries in your geographic region
Default	Default locations: based on number of OCLC symbols linked to the record and the geographic distribution of the libraries represented.

Identify libraries by OCLC symbol

Action
<p>Show institution name (Holdings Display window)</p> <ul style="list-style-type: none"> • In the locations listing, move the mouse pointer over an institution symbol to display the name of the institution. <p>Participating Institutions online</p> <ul style="list-style-type: none"> • For more information about an institution whose symbol appears in a holdings list, search <i>OCLC Participating Institutions</i> online at < http://www.oclc.org/contacts/libraries >

5 Produce and Alternate Produce

Why use Produce or Alternate Produce actions?

- Use the Produce action to
 - Obtain catalog cards based on the bibliographic record for the receiving catalogs of the first holding library code in the 049 field, if you are profiled for catalog cards. **Note:** If multiple holding libraries are listed in field 049 subfield \$a, the system produces cards only for the first holding library.
 - Set holdings in WorldCat.
 - Maintain your archive records at OCLC.
 - Add the record to a file or tape you receive via the MARC Record Subscription service.
 - Use the bibliographic record to generate an item on an accessions list if you subscribe to the OCLC Accessions List service.
- Alternate Produce performs the same functions and generates the same output as Produce, but provides options for ordering catalog cards. Use the Alternate Produce action when you want to order catalog cards in addition to those specified by your profile:
 - Order extra catalog cards.
 - Order catalog cards for all receiving catalogs.
 - Order added copy catalog cards.
 - Combine two or all three Alternate Produce options.

When Produce and Alternate Produce are available

- You retrieve a bibliographic record from WorldCat or the bibliographic save file.
- The record is in local edit mode (not a locked master record)
- The record is in MARC Template or MARC Text Area edit view (not available for Dublin Core edit views).
- Your authorization level permits you to take produce actions (minimum authorization level: Full).

How to use Produce

	Action
1	Retrieve the existing bibliographic record or original record for which you want to produce catalog cards, an accessions list item, or an electronic record. If not in local edit (copy cataloging) mode, open the Edit list and click Edit Record . If necessary, use the View list to switch to MARC Template or MARC Text Area edit view.
2	Edit the record as you wish. Modify field 049 if necessary to produce the desired card set(s). See <i>OCLC Catalog Cards</i> for details on modifying field 049 to add holding library codes and/or input stamps.

	Action
3	<p>On the Action list click Produce and Update Holdings or press <Alt><K> and then <P> (or <Alt><J> and then <P>).</p> <p>The system asks you to confirm that you want to continue with the produce action.</p> <p>For an original record, the system asks you to confirm that you want to add the record to WorldCat.</p>
4	<p>Click OK to continue.</p> <p>Or</p> <p>Click Cancel to cancel the produce action and resume editing the record.</p> <p>Results</p> <p>Validation</p> <ul style="list-style-type: none"> • Existing record (copy cataloging). By default, Connexion does not validate the record when you take the Produce and Update Holdings or Alternate Produce and Update action on an existing bibliographic record. If you select Basic or Full validation for actions that set holdings, Connexion does the specified level of validation. • New record. Connexion validates the full record automatically when you add a new record to WorldCat. • 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 producing the record. <p>Record truncation</p> <ul style="list-style-type: none"> • If the record is too long for catalog card production, the system applies truncation rules to reduce record size. Local data for card printing is preserved. <p>Complete produce action</p> <p>When the record is valid, the system</p> <ul style="list-style-type: none"> • For a new record, adds the record to WorldCat and assigns an OCLC control number. • Sets holdings for your library. • Adds your library's institution symbol to field 040. • Transfers a Dewey class number from field 082 subfield \$a to field 092 \$a if you supplied data in other subfields in field 092. • Sends appropriate information to create offline products including catalog cards, accessions lists, and records in an electronic file or on magnetic tape. Delivery of products depends on the your profile. • Creates an archive record that reflects any changes you made while editing the record. • Redisplays the record in local edit mode. A confirmation message appears at the top of the record. Local data fields you added to the record are retained in your copy. • In the record, sets the Produce action status to C (Completed). <p>Note: Saved record deleted after Produce</p> <ul style="list-style-type: none"> • If you retrieved the record from the bibliographic save file, the system deletes the record from the save file after a successful Produce transaction. Resave the record if you need to keep it in the save file for further processing.

Take Actions on Bibliographic Records

How to use Alternate Produce

	Action
1	<p>Retrieve the existing bibliographic record or original record for which you want to produce extra catalog cards, added copy cards, and/or cards for all holding libraries.</p> <p>If not in local edit (copy cataloging) mode, open the Edit list and click Edit Record.</p> <p>If necessary, use the View list to switch to MARC Template or MARC Text Area edit view.</p>
2	<p>Edit the record as you wish.</p> <p>Modify field 049 if necessary to produce the desired card set(s).</p> <p>See <i>OCLC Catalog Cards</i> for details on modifying field 049 to add holding library codes and/or input stamps.</p>
3	<p>On the Action list click Alternate Produce and Update or press <Alt><K> and then <1> (or <Alt><J> and then <1>).</p> <p>The system displays the Alternate Produce Options window.</p>

Take Actions on Bibliographic Records

	Action
4	<p>Specify the alternate produce options you want to apply:</p> <p>In the Extra Cards text box, type the number of extra cards for the receiving catalogs for the first holding library listed in field 049, subfield \$a. Enter a number from 1 to 255.</p> <p>Select the Ad Produce check box to order cards for the receiving catalogs for the first holding library listed in field 049, subfield \$a of the record.</p> <p>Select the All Produce check box to order cards for the receiving catalogs for all holding libraries listed in field 049, subfield \$a of the record.</p> <p>You can use one, two, or all three options.</p>

	Action
5	<p>When finished selecting options, Click Produce to continue with the alternate produce action. Or Click Cancel to cancel the alternate produce action and resume editing the record.</p> <p>Results</p> <p>Validation</p> <ul style="list-style-type: none"> • Existing record (copy cataloging). By default, Connexion does not validate the record when you take the Produce and Update Holdings or Alternate Produce and Update action on an existing bibliographic record. If you select Basic or Full validation for actions that set holdings, Connexion does the specified level of validation. • New record. Connexion validates the full record automatically when you add a new record to WorldCat. • 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 producing the record. <p>Record truncation</p> <ul style="list-style-type: none"> • If the record is too long for catalog card production, the system applies truncation rules to reduce record size. Local data for card printing is preserved. <p>Complete alternate produce action When the record is valid, the system</p> <ul style="list-style-type: none"> • For a new record, adds the record to WorldCat and assigns an OCLC control number. • Sets holdings for your library. • Adds your library's institution symbol to field 040. • Transfers a Dewey class number from field 082 subfield \$a to field 092 \$a if you supplied data in other subfields in field 092. • Sends appropriate information to create offline products including catalog cards, accessions lists, and records in an electronic file or on magnetic tape. Delivery of products depends on the your profile. • Sends information to the catalog card production system to generate the cards specified using alternate produce options. • Creates an archive record that reflects any changes you made while editing the record. • Redisplays the record in local edit mode. A confirmation message appears at the top of the record. Local data fields you added to the record are retained in your copy. • In the record, sets the Produce action status to C (Completed). <p>Note: Saved record deleted after Produce</p> <ul style="list-style-type: none"> • If you retrieved the record from the bibliographic save file, the system deletes the record from the save file after a successful Produce transaction. Resave the record if you need to keep it in the save file for further processing.

Take Actions on Bibliographic Records

Cards produced for Produce actions and options

Produce action/options	Catalog cards produced
Produce and Update Holdings	Cards for the receiving catalogs for the first holding library code in field 049 subfield \$a. Note: If multiple codes appear in 049 \$a, the system produces cards for the first holding library code only.
Alternate Produce and Update All option selected	Cards for the receiving catalogs for all holding library codes in field 049 subfield \$a. Codes may be in one subfield \$a, separated by commas or in multiple subfield \$a's. For example, 049 ABCM,ABCR,ABCS 049 ABCM \$a ABCR \$a ABCS
Alternate Produce and Update Ad option selected	Added cards for the receiving catalogs for the first holding library code in field 049 subfield \$a. The holding library code in 049 subfield \$a must be profiled to receive added cards
Alternate Produce and Update All option selected Ad option selected	Added cards for the receiving catalogs for all holding library codes in field 049 subfield \$a. All holding library codes in 049 subfield \$a must be profiled to receive added cards.
Alternate Produce and Update Extra Cards option: 1	One extra card in addition to the other cards profiled for receiving catalogs for the first holding library in field 049 subfield \$a.
Alternate Produce and Update Extra Cards option: [n] (1-255)	[n] extra cards for the receiving catalogs for the first holding library code in field 049 subfield \$a. Note: Use numbers 1-255. Type numbers in the Extra Cards text box.
Alternate Produce and Update Extra Cards ordered All option selected	[n] extra cards for the receiving catalogs for all holding library codes in field 049 subfield \$a. Note: Use numbers 1-255. Type numbers in the Extra Cards text box.
Alternate Produce and Update Extra Cards ordered Ad option selected	[n] extra cards and added cards for the receiving catalogs for the first holding library code in field 049 subfield \$a. The first holding library code in 049 subfield \$a must be profiled to receive added cards.
Alternate Produce and Update Extra Cards ordered Ad option selected All option selected	[n] extra cards and added cards for the receiving catalogs for all holding library codes in field 049 subfield \$a. All holding library codes in 049 subfield \$a must be profiled to receive added cards.

OCLC Catalog Cards

See *OCLC Catalog Cards* for details on produce, alternate produce, and OCLC catalog cards.

OCLC Catalog Cards is available on the OCLC Web site at:

<<http://www.oclc.org/support/documentation/worldcat/cataloging/cards/default.htm>>.

6 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.
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.

Take Actions on Bibliographic Records

Printed Content or Formatting	Description / Notes
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.

7 Create labels

About printing labels in Connexion

- **One label set.** The OCLC Cataloging Label Program is required to create single labels from Connexion. To view, edit, and print one label set for a bibliographic record, you need the latest version of the Label Program (version 1.22 or later) installed on your workstation.
- **Label file: labels for multiple records.** To create labels for a group of records from Connexion by downloading a label file, you do not need the Label Program on your workstation. You can copy the downloaded file to a computer where the Label Program (or any compatible label printing software) is installed and then import the file to view, edit, and print the labels.
- You can **print one label set for the current record** when:
 - You retrieve a bibliographic record from WorldCat or the bibliographic save file.
 - The record is in local edit mode (not a locked master record) or in display mode.
 - The record is in MARC Template or MARC Text Area edit view or MARC display view (not available for Dublin Core views).
 - You take the **View Label in Label Program** action on the record.
- You can **create and download a file to print a batch of labels** when:
 - To flag WorldCat records, you must first save the records and then flag them in the bibliographic save file.
 - You take the **Create Labels for Flagged Records** action on the group of flagged records.

Prepare to print labels with the OCLC Cataloging Label Program

	Action
1	Install the OCLC Cataloging Label Program or upgrade to the latest version (1.22 or later). <ul style="list-style-type: none"> • Download the Label Program from the OCLC web site. • For instructions on installing and setting up the software, see <i>Getting Started with OCLC Cataloging Label Program</i>. Note: To install or reinstall the Label Program on Windows 2000, Windows XP Professional, or Windows XP Home, you need local administrator privileges for your workstation.
2	(Optional) If you have not previously used the Label Program, you may need to: <ul style="list-style-type: none"> • View and update settings for Label Program options. • Select a label printer if you do not use your Windows default printer for label printing. • Load label stock in your printer and check the alignment by printing a test label. See <i>Getting Started with OCLC Cataloging Label Program</i> or the Label Program Help for instructions.

	Action
3	<p>In Connexion, specify the label format you want to use for viewing and printing single labels.</p> <ul style="list-style-type: none"> • On the General tab, under Admin Options, click Preferences. • At the Preferences screen, click Cataloging Options. • On the Cataloging Options screen, under Label Format, Click to select one of the option buttons: • SL4 • SL6 • SLB • SP1 <p>Default setting: SL4.</p>
4	Click Save My Default or Save For Session .

Labels for one record

Note: Call number required

- If the record does not contain a call number, the system displays an error message and cancels the View Label in Label Program action.
- Based on the classification scheme associated with your authorization, the system automatically extracts a call number from the record and inserts it in the label display. For each classification scheme, the call number for labels is extracted from one of several possible fields.

	Action
1	<p>Retrieve the bibliographic record for which you want to print labels.</p> <ul style="list-style-type: none"> • The record must be in local edit (copy cataloging) mode or display mode. If the record is in a Dublin Core view, use the View list to switch to MARC Template or MARC Text Area view. • Locked record. The label action is not available for a locked master record. To create labels for a locked record, complete your work on the record and replace it in WorldCat. After you replace the record, the system redisplay it in local edit mode, ready for label printing.
2	<p>Edit the record as you wish. For example:</p> <ul style="list-style-type: none"> • Supply a call number for the classification scheme your library uses. • Modify the existing call number. • Type a lowercase x as the only text in a call number field to produce labels without a call number. • Type input stamp(s) in brackets in the OCLC Holding Library Code field (049 field, subfield \$a). <ul style="list-style-type: none"> — If you type the input stamp to the left of the holding library code, the input stamp will appear above the call number on the spine and to the left of the call number on the pocket. — If you type the input stamp to the right of the holding library code, the input stamp will appear below the call number on the spine and to the right of the call number on the pocket. — Examples <i>[REF] azum</i> <i>azum [ProfShelf]</i> • Edit text in the author (1xx) or title (245 \$a) field that prints on labels.

	Action
3	<p>On the View list click View Label in Label Program or press <Alt><K> and then <Y> (or <Alt><J>and then <Y>).</p> <p>Results</p> <ul style="list-style-type: none"> • The system extracts data from the record and downloads the text to your workstation. • The OCLC Cataloging Label Program starts automatically (if it is not already running). • The Label Program displays the label set using the label format you specified in Connexion Cataloging Options. • In the record, the system sets the Label action status to C (Completed). <p>Note: Browser messages. When you generate a single label from Connexion, the system sends a temporary file to your workstation to load into the Label Program. Some browsers display a message box asking whether to save the file or open it. If you see this message, select the Open option to automatically open the file in the Label Program (version 1.22 or later). To prevent the browser from displaying this message each time you create a single label, click the Don't show again option at the bottom of the message box.</p>
4	<p>In the Label Program, finish processing the label.</p> <p>You can:</p> <ul style="list-style-type: none"> • Edit the label text, specify print constants, or change the number of copies to print • Print the label set(s) now • Save the label to the Label Program local file for later printing • See the Label Program Help for instructions <p>Notes: 9-line spine label in SL6 format. Connexion sends 9 lines of SL6 spine label information to the Label Program. Most call numbers fit within 9 lines, so you seldom need to make adjustments. The SL6 label display in the Label Program allows you to add lines on the spine label up to a total of 15, if needed. Prompt to save unedited label. If you close the label window or exit the Label Program after printing, without first saving the displayed label, the Label Program asks whether you want to save the changes to the Label Program file (even if you have not edited the displayed label). Save labels to the Label Program file to print later in batch mode or to keep a file of all labels you print. However, if you do not want to keep your labels in a Label Program file, you may turn off this warning. To turn off the warning message,</p> <ul style="list-style-type: none"> • In the Label Program, on the Options menu, click Warn Before Closing Unsaved Label. • The check mark is removed from the option.

Create label file for multiple flagged records

Note: non-OCLC label software.

- The following procedure explains how to import a Connexion label file for use with the OCLC Cataloging Label Program.
- You can also use the Connexion label file with any other label software that accepts label files from OCLC Connexion.

- **SL4 format file.** Connexion creates label files in SL4 format. To print labels in another format, your software must convert from SL4 to the desired format.

Add more than 100 labels to label file. You can add more than 100 labels at once to a label file. However, to prevent timeout problems that can occur with larger batches, Connexion browser pauses after creating 100 labels and asks you to confirm that you want to continue processing the flagged records.

	Action
1	<p>Retrieve a set of records that includes records for which you want to create labels. You can retrieve records from WorldCat or from the bibliographic save file.</p> <p>Tips</p> <ul style="list-style-type: none"> • Save WorldCat records. You cannot flag records in WorldCat for group actions such as creating a label file. You must save WorldCat records in the bibliographic save file, retrieve them from the save file, and then flag the records. • Use Mark for Label (Optional). Before or after saving a record for which you plan to create labels, on the Action list click Mark for Label or press <Alt><K> and then <3>. The record's Label status changes to R (Ready). When ready to create labels for a group of saved records, search the save file for records with the Label status Ready. • Note: You must save the records in order to retrieve them by searching for the Label - Ready status. If your workflow involves marking records for label creation, you can have the system save records automatically when you take the Mark for Label action. On the Cataloging Options screen, set the Mark for Label and Save Record option to On (default setting is Off). • Use My Status. (Optional) When you save a record for label printing, enter text in the My Status box (for example, label print) to distinguish the records. Then search the save file for the My Status text to retrieve only the records you prepared for label printing.
2	<p>Flag the records for which you want to create labels.</p> <ul style="list-style-type: none"> • Results list. At a save file results screen, click the open box in front of the brief entry for each record or open the Action/Sort list (top right corner of screen) and click Flag All on Page or Flag All Records Retrieved. • Full record. On the Action list, click Flag Record (action not available for a record retrieved from WorldCat.)
3	<p>(Optional) Repeat steps 1 and 2 to retrieve and flag more records for label printing.</p>

	Action
4	<p>At the top of the results screen, open the Action/Sort list and click Create Labels for Flagged Records. The system displays a screen listing all records flagged for creating the label file.</p> <p>Note: Flagged records not in current results list. If all the records you flagged are not in the current result set, use a Show Flagged option to retrieve a list of all flagged records in the bibliographic save file.</p> <ul style="list-style-type: none"> • On the Cataloging tab, under Show Options, click Flagged SF Records. • On the flagged records screen, open the Action/Sort list and click Create Labels for Flagged Records.
5	<p>Scan the list to verify that it includes the records you want. At the top of the screen, click OK to create the label file.</p> <p>Results The system changes the Label status for the records to C (Completed) or F (Failed).</p>

Download label files

- **Label files:**
 - Are created and stored on the Connexion server.
 - Allow appending until downloaded.** You can continue adding labels to the same file until you download the file.
 - Contain labels that are created by users from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file type is **Institution**. To create label files for your individual authorization, set the Label File Type option (on the Cataloging Options screen) to **Individual**.
 - Remain available for download for 7 days from the file creation date. After 7 days, the system automatically deletes label files.

	Action
1	<p>Go to the Download Label Files screen. On the General tab, on the Admin Options list, click Download Label Files.</p>
2	<p>1. In the list of files, find the file(s) you want to download. 2. Click to select the check box for each file. Download multiple files: You can download 2 or more files at once. Before sending the files to the browser, the system creates one file that contains labels from all selected files.</p>
3	<p>When finished selecting files, click Download.</p>
4	<p>The next step depends on which browser you use.</p> <ul style="list-style-type: none"> • Internet Explorer. In the File Download dialog box, select Save or press <Enter>. • Netscape Navigator. In the Unknown File Type dialog box, click Save File.

	Action
5	<ol style="list-style-type: none"> 1. In the Save As dialog box, use the Save In box to select the location (drive and folder) where you want to save the exported record. 2. In the File Name box, use the supplied file name and extension (system default is Label.svs). Or Change the name if desired. <ul style="list-style-type: none"> — Supply a name that identifies the file as containing labels from Connexion. You may want to include a date or day of the week and/or the type of records used to generate the label file. — Retain the file name extension .svs (required to import the file to the Label Program). — Note: To change the default file name for label files, use the Label File Name setting on the Cataloging Options screen.
6	<ul style="list-style-type: none"> • Click Save or press <Enter>. • Click Close or press <Enter> to close the Download Complete message box.

Import label file to Label Program

	Action
1	<p>Import the label file to the Label Program</p> <ol style="list-style-type: none"> 1. Start the Label Program. 2. Import the label file downloaded from Connexion. On the File menu click Import. 3. At the Import File Format dialog box, leave the SL4 option button selected to indicate that the file you are importing is in SL4 format. Click OK to continue importing. You must select SL4; the label file downloaded from Connexion is always in SL4 format. 4. Format mismatch message. If the default format specified in the Label Program is not SL4, the Label Program notifies you that the default format does not match the label format of the file you are importing. The message asks whether you want to change the setting for default label format. Click No to keep the existing setting and convert the SL4 labels to the format you specified. 5. Import status message. After importing the labels, the Label Program displays a message reporting the results. The message confirms that the import is complete, gives the number of labels imported, and asks whether you want to delete the downloaded label file. Click Yes to delete the file, or click No to keep the file. <p>See the Label Program Help for more information on importing a label file.</p>
2	<p>After importing the label file, retrieve the imported labels and complete processing and printing.</p> <p>Note: 9-line spine label in SL6 format. Connexion sends 9 lines of SL6 spine label information to the Label Program. Most call numbers fit within 9 lines, so you seldom need to make adjustments. The SL6 label display in the Label Program allows you to add lines on the spine label up to a total of 15, if needed.</p>

Take Actions on Bibliographic Records

Tip: Override browser-supplied file type and name for label file

	Action
1	<p>When the Save As dialog box appears, the browser supplies a default location (drive and folder), file type, and file name. The File Name box is selected. To override the default file type and file name:</p> <ul style="list-style-type: none"> In the File Name box, type the name for the label file, including the extension (.svs), enclosed in quotation marks. Example "labels1017.svs" <p>To save the label file to a different location, specify the drive and folder within the quotation marks:</p> <ul style="list-style-type: none"> Type the drive letter followed by a colon and a backslash. Type the folder name(s), separated by backslashes. Example "c:\data\labels0310\labels1017.svs"
2	Click Save or press <Enter>.

Manage label files

This section summarizes information and functions provided on the Download Label Files screen.

Column in file list	Purpose or content
Select	Provides check boxes for selecting listed files.
Authorization	Column is blank for institution files that contain labels created by any user at your institution. For individual files, the column shows the authorization number under which the file was created. May show your authorization number or that of any user from your institution.
Created	Date and time when the file was created.
Format	Indicates that listed files contain label data.
Bytes	Size of file in kilobytes.
Downloaded	Date and time when the file was first downloaded. Shows Not Downloaded for a file not yet downloaded.
Hidden Appears when you click Show Hidden Files to view a list containing files previously hidden.	If the file is currently hidden, lists the date and time the file was hidden. If the file has been restored to the list, the column is blank.

Action	Procedure
Download a label file	Select the check box for the file and click Download .
Hide downloaded file	Select the check box for a previously downloaded file and click Hide .
Show hidden file	Click Show Hidden Files .

Take Actions on Bibliographic Records

Action	Procedure
Restore hidden file to list	Click Show Hidden Files . Select the check box for a hidden file and click Restore .
Clear selections	Click Reset .

Label formats

Label format	Label set produced
SL4	<p>1 spine label: Up to 9 lines of 8 characters each for call number and input stamps</p> <p>2 card/pocket labels: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title: 2 lines No blank lines</p> <p>Note: When you create a label file for a group of flagged records, Connexion always creates the file in SL4 format. You can change the label format in the OCLC Cataloging Label Program.</p>
SL6	<p>1 spine label: Up to 15 lines of 8 characters each for call number and input stamps</p> <p>2 card/pocket labels: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title: 2 lines Blank lines separate text groups</p> <p>Note: 9-line spine label in SL6 format. Connexion sends 9 lines of SL6 spine label information to the Label Program. Most call numbers fit within 9 lines, so you seldom need to make adjustments. The SL6 label display in the Label Program allows you to add lines on the spine label up to a total of 15, if needed.</p>
SLB	<p>1 spine label: Up to 9 lines of 8 characters each for call number and input stamps</p> <p>1 card/pocket label: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title: 2 lines No blank lines</p>

Take Actions on Bibliographic Records

Label format	Label set produced
SP1	1 spine label: Up to 9 lines of 8 characters each for call number and input stamps No card/pocket labels:

Fields selected for labels

Label Area	Fields/subfields selected
Title	<ul style="list-style-type: none"> • 245 \$a
Author	<ul style="list-style-type: none"> • 100 \$a \$b \$d • 110 \$a \$b \$d • 111 \$a \$b \$d • 130 \$a \$d
Call Number	For each classification scheme, the call number is extracted from one of the fields in the following list. Fields are listed in order of their priority for selection. <ul style="list-style-type: none"> • Library of Congress: 099, 098, 090, 050, 092 • Dewey: 099, 098, 092, 090, 050 • National Library of Medicine: 099, 098, 096, 060, 090, 050 • Canadian: 099, 098, 055, 090, 050 • Government: 099, 098, 090, 050, 092 • National Agricultural Library: 099, 098, 070, 090, 050 The system does not pull call numbers from 852, 082, or 086 fields.

Label Program documentation

The Label Program *Getting Started* booklet, keyboard template, FAQ, and other information are available online at <http://www.oclc.org/support/documentation/label/>

Cataloging Service User Guide

See the following document for more information on generating labels from bibliographic records:

- *OCLC Cataloging Service User Guide.*

8 Replace master bibliographic record

Record replace capabilities

Record replace capabilities decentralize responsibility for quality control in WorldCat by allowing members to modify existing master records. This improves the quality of WorldCat. Members can correct or revise a working copy of a master record and then replace the master record with the edited version. **Note:** You can replace records only in the modes for which you are authorized.

Actions you can take on bibliographic records depend on your OCLC authorization level, which has a default cataloging level (mode). The authorization you use when you log on tells Connexion what actions you are authorized to take.

You can upgrade records by editing and replacing them only as allowed by the cataloging mode(s) for which you are authorized.

Examples:

- With a Full cataloging authorization, you can upgrade a minimal-level record. For example, you can upgrade NetFirst records (OCLC symbol N@F), which have Encoding Level 3.
- Even if the record is coded as full level, you can enrich the record with a call number, contents note, or URL. You can also correct an existing contents note or URL.
- You can modify other records if you are authorized to participate in a cooperative program such as ENHANCE or CONSER.

Note: Records with non-Latin script suppressed

Non-Latin script data in a WorldCat record does not display when you open the record using the Connexion browser. "Non-Latin script suppressed" displays in the upper right of the record. You cannot lock or replace these records; however, you can continue to locally edit and export them. You must continue to use the Connexion client interface to replace master records in WorldCat that contain non-Latin script.

More information:

- For more information about authorization modes in relation to replacing records, see the section below titled "Upgrade records":
- See also *OCLC Bibliographic Formats and Standards*, chapter 5, "Quality Assurance"

Types of modifications

In addition to replacing your own records (records you created and no one else has used), the system also allows Minimal-level upgrades, Database Enrichment, Enhance, and CONSER replace capabilities on records entered by others. When you can replace your own record is explained in this section, and when you can use the other replace capabilities is explained in the other sections of this chapter.

Take Actions on Bibliographic Records

Replace your own record

The system allows you to replace master records if

- Your institution created and added the record to WorldCat
- Your institution's holding symbol is attached to the record
- No other institution's holdings symbol is attached to the record

Additions and modifications can be made to all editable fields. Use the following guidelines to identify such records:

- Your OCLC symbol is in field 040 (Cataloging Source) subfield ꞗc (Transcribing agency)
- Location message (top center of the screen) is HELD BY [xxx] - NO OTHER HOLDINGS. (xxx = Your OCLC symbol)

Add local information. You can add local information as part of the editing that you do before replacing the record. The local information is not added to the master record as part of the replace transaction, but it is retained in your working copy of the record. If you complete editing before entering the Replace command, you can enter the Produce or Update command immediately after completing the replace transaction without further editing.

Replace master records containing controlled headings

The ability to replace a master record depends on your authorization level and whether or not headings have changed when you controlled them.

Any Full-level or higher authorization can replace master records with encoding levels *K*, *M*, 2, 3, 4 (without field 042), 5, and 7 whether or not the heading has changed.

To determine the ability of Full-level or higher authorizations to replace master records with encoding level *b*, 1, 4 (with field 042 coded *pcc*), *I*, or *L*, see this table.

Heading changed?	Authorization mode	Replace master record?
No ^a	Full-mode or higher	Yes
Yes	Full-mode	No
	Enhance or CONSER	Yes ^b

a. Changes to punctuation, capitalization, diacritics, and the first indicator do not count as a change.

b. If you are authorized to Enhance for the format of the record

You do not receive a database enrichment credit when you control headings and replace the master record.

**Replace master record
(procedure)**

	Action
1	Retrieve the record you want to modify and replace from the bibliographic save file.
2	On the Action list --click Lock Master Record or press <Alt><K> and then <M> (or <Alt><J> and then <M>).
3	Modify the record as you wish.
4	On the Action list click Replace Record (or press <Alt><K> and then <A>) or Replace and Update Holdings (or press <Alt><K> and then <N>). The system asks you to confirm that you want to replace the record.
5	<p>Replace record.</p> <ul style="list-style-type: none"> • Click OK to continue and replace the master record. <p>Result</p> <ul style="list-style-type: none"> • Connexion automatically validates all edited fields in the record. • 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. • When the record is valid, Connexion replaces it in WorldCat and sets your holdings if you took the Replace and Update Holdings action. • The system adds the full date/time stamp for the Replace in field 005. Example of Replace date/time format: 19950830024628.0 (1995 = year; 08 = month; 30 = day; 02 = hour; 46 = minutes; 28 = seconds; .0 = fraction of second [always 0]) • The system notifies you that the record has been replaced. (Replace status for the record changes to C for completed). • The master record is unlocked. • The system automatically deletes the record from the save file. Resave the record if you need to keep it in the save file for further processing. <p>Or</p> <p>Cancel replacing the master record.</p> <ul style="list-style-type: none"> • Click Cancel if you want to stop without replacing the record. <p>Result</p> <ul style="list-style-type: none"> • The system redisplay the record for further editing. The master record remains locked.

Release lock on master record

Action
With the record open, on the Action list click Release Record Lock or press <Alt><K> and then <W> (or <Alt><J> and then <M>).
Result
<ul style="list-style-type: none"> • The master record is unlocked in WorldCat. • Changes you made while the record was locked are retained in your working copy.

Upgrade records

You can lock, edit, and replace your own WorldCat records if no other institution has used the record for cataloging. In addition, the system allows Minimal-Level Upgrades, Database Enrichment, and Enhance and CONSER upgrades on records entered by others. You can also replace a master record after controlling headings if controlling results in no change to the normalized heading.

The following table describes specific upgrade types and shows authorizations required to do the upgrades. Your authorizations are determined by your OCLC library profile.

Note: Add call number and/or subject headings. Regardless of your library's profile, you can add a call number and subject heading(s) to a master record, as long as the call number or subject heading scheme is not already in the record. For example, if your library is profiled to add Library of Congress (LC) subject headings only, you can add National Library of Medicine (NLM) subject headings to a record that does not already contain NLM headings.

Upgrade Type	Description	Authorization Required
Minimal-level upgrade	<ul style="list-style-type: none"> • Add and modify all editable fields of less-than-full-level records (Encoding Levels: K, M, 2, 3, 4, 5, and 7) to upgrade them to full-level (Encoding Level I) or less-than-full (Encoding Level K) • Add a call number or subject heading(s) if the call number or subject heading scheme is not already in the record • For Encoding Level 4, cannot add or modify editable fields of PCC (Program for Cooperative Cataloging) records (field 042 contains pcc) • Cannot add or modify editable fields of CONSER-authenticated serial records (field 042 contains a CONSER authentication code) 	<ul style="list-style-type: none"> • Full • Retrocon • Enhance • CONSER

Upgrade Type	Description	Authorization Required
Database Enrichment	<ul style="list-style-type: none"> • Add: <ul style="list-style-type: none"> — Call numbers — Subject headings in schemes not already in the record — Non-Latin script (Connexion client only). Full-mode users can add or change non-Latin script fields in full-level master records. A single field or record can contain more than one non-Latin script . The system treats these fields like other database enrichment fields. Most 1xx-8xx fields and some 0xx fields can have non-Latin-script equivalent 880 fields. — Field 006 and field 007 — Field 300 to CIP records • Edit: <ul style="list-style-type: none"> — Field 505 — Field 856 — Field 880 • Add or modify editable fields of full-level serial records that have 10 or fewer holdings • Cannot modify CONSER-authenticated serial records (field 042 contains a CONSER authentication code) <p>Notes: You do not receive a database enrichment credit when you only control headings and replace the master record. Add or edit non-Latin script: Connexion client only. To add or edit non-Latin script in a record, you must use the Connexion client interface.</p>	<ul style="list-style-type: none"> • Full • Retrocon • Enhance • CONSER

Take Actions on Bibliographic Records

Upgrade Type	Description	Authorization Required
Enhance (Regular & National)	<ul style="list-style-type: none"> • All non-serial records <ul style="list-style-type: none"> — Regular: All encoding levels except blank, 1, and 4 in records with pcc in field 042 — National: All encoding levels • Nonprint serial records not authenticated by CONSER <p>Notes:</p> <ul style="list-style-type: none"> • Institution must be authorized for the format(s) • For more information, see section 4.6 “Enhance and CONSER” in the <i>OCLC Cataloging User Guide</i> 	<ul style="list-style-type: none"> • Enhance
CONSER (Regular & National)	<ul style="list-style-type: none"> • All print and nonprint serial records <p>Notes:</p> <ul style="list-style-type: none"> • See more information about CONSER on the Library of Congress Web site • For more information about CONSER editing capabilities, consult the <i>CONSER Editing Guide</i> (Library of Congress) 	<ul style="list-style-type: none"> • CONSER

9 Maintain URLs in bibliographic records

When you can correct or add a URL

Basic capabilities

- You qualify for a database enrichment credit when you correct a URL and replace the master record.
- To correct URLs and replace records, you need at least a Full mode authorization.
- With a Full mode authorization, you can replace records created by any institution to correct URLs in the following fields: 505, 506, 520, 530, 583, and 856. In addition, you can replace records you contributed that are held by only your library to correct any other fields.

Details for specific record types

- For CONSER records (serials that have field 042), you must have a CONSER authorization to change the URL in field 856 or to add field 856 in the master record.
- For minimal-level records (also called “less-than full” level), any cataloging user with a Full authorization may edit and replace most of the data in the record. (CONSER records are again an exception; you must have a CONSER authorization to replace a master record.)
- An Enhance level authorization allows selected users to edit master records based on the format of the record (sound recording, computer file, etc.)
- Additional information is available in chapter 5 of *OCLC Bibliographic Formats and Standards*.

Correct or add a URL: basic steps

To correct a URL in a bibliographic record, or add a URL to the record, follow these steps:

	Action
1	Open the record for editing.
2	On the Action list, click Lock Master Record .
3	Change the URL in one of the fields specified in the next section, or add one of these fields.
4	Take the appropriate action: Replace Record or Replace and Update Holdings .
5	After completing the Replace transaction, edit the record for your own use.

Record fields that may contain URLs

- The following table lists the fields and subfields in a MARC bibliographic record that may contain a URL.
- For each MARC field/subfield, the table lists the Dublin Core element and qualifier displayed in a Dublin Core view of the record.

Take Actions on Bibliographic Records

MARC Field	Dublin Core Equivalent
505 \$u	dc.description.tableOfContents.URI
506 \$u	No equivalent defined
514 \$u	dc.description.dataQualityNote.URI Note: MARC tag 514 text does not map to any Dublin Core element and does not display or output in DC views. DC users see only the URI.)
520 \$u	dc.description.URI (when 1st indicator = 8) dc.description.summary.URI (when 1st indicator = 'blank') dc.description.abstract.URI (when 1st indicator = 3) dc.relation.hasReview.URI (when 1st indicator = 1) dc.description.scope.URI (when 1st indicator = 2)
530 \$u	dc.relation.hasVersion.URI Note: Formerly 775 \$o mapped to this element. Since 775 \$o is seldom used, it is no longer mapped to Dublin Core.
538 \$u	No equivalent defined
540 \$u	No equivalent defined
545 \$u	dc.description.note.URI Note: MARC tag 545 text does not map to any Dublin Core element and does not display or output in DC views. DC users see only the URI.)
552 \$u	dc.description.entity-AttributeNote.URI Note: MARC tag 552 text does not map to any Dublin Core element and does not display or output in DC views. DC users see only the URI.)
563 \$u	No equivalent defined
555 \$u	dc.relation.indexedBy.URI (when 1st indicator = 'blank' or 8) dc.relation.findingAid.URI (when 1st indicator = 0)
583 \$u	dc.description.actionNote.URI
856 \$u	dc.Identifier.URI

10 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.

11 Procedures for cataloging agents

Cataloging Agent authorizations

- **Purpose.** Cataloging agents are authorized to process cataloging records for libraries that are members of a Cataloging Agent group or other cooperative program. Agents also process batchloaded records for group members when the records cannot be processed automatically.
- **Request authorization.** Request a Cataloging Agent authorization from your OCLC regional service provider or distributor. For existing Union List groups, the Cataloging Agent authorization must be assigned to the Union List agent. If the group does not have a Union List agent, you must designate a Union List agent to receive the Cataloging Agent authorization.
- **Cataloging activities.** The Cataloging Agent authorization provides the same capabilities as a Full authorization. Agents have access to the Cataloging, Authorities, and General tabs in Connexion browser. Agents whose authorizations are profiled for WebDewey or Abridged WebDewey have access to the Dewey Services tab.
- **Agent-specific privileges in Connexion.** In OCLC Connexion browser, cataloging agents can take the following actions:
 - **Cataloging actions.** An agent can take the following actions when processing records for other libraries or for the agent's library: Update Holdings, Produce and Update Holdings, Alternate Produce and Update, Delete Holdings, and Export Record in MARC (bibliographic or authority records).
 - **Authority File privileges.** For another library or for the agent's library, an agent can edit an authority record and export the edited record. Agents can also create authority records.
 - **Replacing records.** In addition, an agent can lock a master record in WorldCat and then take the Replace action. An agent cannot replace a record that contains field 951.

Use field 951

- **Purpose.** Field 951 (Group Specific Data) supports processing of records for multiple libraries by cataloging agents. Data in field 951 determines which institution holdings are set or deleted and which offline products are generated.
- **Validation.** Cataloging agents must enter valid data in field 951 subfield $\#I$ (e) before taking a final action on a bibliographic record. The system verifies that institution symbols listed in field 951 subfield $\#I$ are group members for which the agent is profiled.
- **Invalid symbol.** For an invalid symbol, the system displays a validation error. The agent must correct or delete the invalid symbol and then retry the final action.
- **Note.** Cataloging agents cannot process records for their own institutions using field 049. If the agent's group profile includes the agent's institution, the agent can list the OCLC symbol in field 951 subfield $\#I$. Or the agent can log on with another Full cataloging authorization to process the records.

Take Actions on Bibliographic Records

Characteristic	Description
Field 951	Field 951 is repeatable. Only cataloging agents can enter field 951.
Indicators	Both indicators are blank.
Subfields	Subfields ‡a-‡k and ‡m-‡z are exported, but otherwise ignored.
	‡a-‡k User-defined (Repeatable)
	‡l OCLC institution symbol (Repeatable). Agent enters OCLC symbols for institutions in the group. The system sets or deletes holdings for each institution listed in 951 subfield ‡l.
‡m-‡z' User-defined (Repeatable)	
Card printing	Field 951 does not print on catalog cards.
Retention	Field 951 is not retained in master records or archive records.

Process records

	Action
1	Log on to Connexion browser with a Cataloging Agent authorization.
2	Retrieve the bibliographic record you want to process.
3	<p>Edit field 951 as required to include symbols of the libraries for which you are acting.</p> <p>Examples:</p> <p>951 ‡l abc ‡l mnopq ‡l trn</p> <p>951 ‡l abc trn ocl ord obl</p> <p>951 ‡l acd abc ‡a fiction project</p>
4	<p>(Optional) View institution names for OCLC symbols:</p> <ol style="list-style-type: none"> At field 951, on the Functions list click Show Institution. With the mouse, point to an OCLC symbol entered in field 951. The institution name appears in a small popup window. <p>To resume editing field 951, on the Functions list click Edit Field.</p>
5	<p>On the Action list, select the action you want to take on the record. Or use the keystroke for the action.</p> <ul style="list-style-type: none"> • Alternate Produce and Update (<Alt><K> and then <1>) • Delete Holdings (<Alt><K> and then <9>) • Export Record in MARC (<Alt><K> and then <E>) • Produce and Update Holdings (<Alt><K> and then <P>) • Update Holdings (<Alt><K> and then <U>) <p>Validation errors</p> <p>If Connexion reports invalid symbol(s) in field 951, correct or delete the invalid symbol and retry the action.</p>

Take Actions on Bibliographic Records

Replace newly added records to correct errors

When logged on as an agent, if you notice an error in a record just added for a client institution, use the following procedure to lock, edit, and replace the record. This method allows you to correct and replace the record, provided that no institution that is not among your clients has set holdings on the record.

Note: Agent's institution must be a client This procedure requires that your own institution be included in the client list for your agent authorization.

	Action
1	Create record and take the Update Holdings action to add holdings for 1 or more client institution(s).
2	After adding the record, notice an error in the record content.
3	Remove the holdings you added for your client institution(s).
4	Add holdings for your own institution.
5	Lock, edit, and replace the record.
6	Use the Delete Holdings action to remove holdings for your own institution
7	Add holdings for the appropriate client institution(s) back to the record.

Offline products

- The command the agent uses determines offline products for the OCLC symbols listed in field 951 subfield #1.
- Which offline products are generated for an institution depends on the institution's profile.

Command	OCLC-MARC Records	Catalog Cards	Accessions List
Produce	Appear in file or on tape if profiled	Produced only if the default holding library code is profiled for cards.	Produced if profiled
Update	Appear in file or on tape if profiled	No cards produced	Transaction does not appear on list
Delete Holdings	Appear in file or on tape if profiled	No cards produced	Transaction does not appear on list
Save	Saved in agent's bibliographic save file		
Export	Exported to a file on agent's workstation or to agent's local system		

Take Actions on Bibliographic Records

Billing and credits

- Charges for online cataloging transactions are billed to the agent.
- Credits (such as a credit for original cataloging) are issued to the agent.
- Libraries whose institution symbols appear in field 951 subfield #1 receive catalog cards, OCLC MARC records, and/or other offline products based on the library's profile or subscriptions. Charges for offline products are billed to each library.

Reports

Report characteristic	Description
Format	No-charge comma-delimited report in ASCII text.
Contents	Agent activity by OCLC symbol Actions reported: Update Holdings, Produce and Update Holdings, Alternate Produce and Update Note: Report lists only transactions that add new holdings to a record. Does not include transactions performed on behalf of a library whose holdings were previously added to a record.
Posted to	OCLC Product Services Web
Frequency	Monthly
Longevity	90 days

12 Bibliographic record actions: display mode

Display mode and display views

- **Display mode.** You are in display mode **when you have not begun editing a record.** The record appears in a display view for the current format (MARC or Dublin Core).
- **Switch to display mode from edit mode.** You switch from edit mode to display mode when you save a record or take the Cancel Changes action.
- **MARC display view.** Display view is the same whether you select MARC Template or MARC Text Area in the View list.
- **Dublin Core display view.** Display view is the same whether you select DC Template or DC Text Area in the View list. You can also display a record in DC HTML or DC RDF; in these views, export is the only action available.

Actions available in display mode

Action	How To
Edit record Master or local edit mode	On the Action list, click Lock Master Record or on the Edit list, click Edit Record . The record appears in an edit view for the current format (MARC or Dublin Core).
Derive New Record	<ol style="list-style-type: none"> 1. On the Edit list click Derive New Record or press <Alt><K> and then <D> (or <Alt><J> and then <D>). 2. When the system asks whether you want to transfer fixed-field values to the new record, <ul style="list-style-type: none"> — Click Yes to transfer all fixed-field values except the OCLC control number, Rec Stat, Entered, and Replaced. Rec Stat is set to Q (New). Both Entered and Replaced are set to the current date, — Click No to transfer only default fixed-field values for the format, as indicated by the value in the Type element. — Click Cancel to cancel deriving a new record. <p>Results The system displays the content of the new record. Variable fields transfer based on your settings for the Derive Record Fields option (Cataloging Options screen). NEW appears in place of an OCLC control number.</p>
Report Error	Report an error in a record by sending an e-mail message to OCLC quality control staff. <ol style="list-style-type: none"> 1. View the bibliographic 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.

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</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 master 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.
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</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 master 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.

Action	How To
<p>Save record Save a new or existing record or resave a saved record</p>	<p>On the Action list, click Save Record. Assign a workflow status appropriate for the record's position in your cataloging workflow. If desired, enter a note or identifier in the My Status text box. Click Yes to add the record to the save file. The system saves the record and displays the save file number for the record. Or click No to cancel saving the record. Locked master record. When you save a locked master record, the system places a long-term (14-day) lock on the master record in the Resource Catalog and in WorldCat. Other users can retrieve a copy, but cannot change the master record. Resave record. When you resave a record, the system resets the records age in the save file to 0 days.</p>
<p>Print Record</p>	<ol style="list-style-type: none"> 1. On the Action list click Print Record. Or Press <F12>. 2. In the Print dialog box, click Print.
<p>Derive New Constant Data Record</p>	<ol style="list-style-type: none"> 1. On the Edit list click Derive New Constant Data Record or press <Alt><K> and then <4> (or <Alt><J> and then <4>). 2. When the system asks whether you want to transfer fixed-field values to the new CD record, <ul style="list-style-type: none"> — Click Yes to transfer all fixed-field values except Entered and Replaced. (Note: Both Entered and Replaced are set to the current date.) — Click No to transfer only default fixed-field values for the format, as indicated by the value in the Type element. — Click Cancel to cancel deriving a new CD record. <p>Results The system displays the content of the new constant data record. Variable fields transfer based on your settings for the Derive Record Fields option (Cataloging Options screen).</p> <p>Complete new CD record</p> <ol style="list-style-type: none"> 1. Edit the new CD record to add or revise content. 2. On the Action list click Save Constant Data Record. 3. 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. 4. Then click OK to add the record to your institution's constant data database.

Action	How To
Display Holdings	<p>1. On the View list click Display Holdings or press <Alt><K> and then <H> (or <Alt><J> and then <H>).</p> <p>2. In the Display Holdings box (above the record header), click Display Holdings or press <Enter> to view the Default Holdings. Or Open the list and select the type of holdings display you want: All Holdings or Regional Holdings or State Holdings.</p> <p>3. Then click Display Holdings or press <Enter>. The Holdings Display window lists the holdings you requested. When finished viewing holdings, click Close Window. Note: The Holdings Display window closes automatically when you choose another command or navigate to another screen.</p> <p>Print holdings list (Internet Explorer only).</p> <ol style="list-style-type: none"> Right-click in the Holdings Display window. On the popup menu click Print. In the Print dialog box, click OK or press <Enter>. <p>Identify listed institutions</p> <p>Show institution name (Holdings Display window)</p> <ul style="list-style-type: none"> In the locations listing, move the mouse pointer over an institution symbol to display the name of the institution. <p>Library symbols in lists. In holdings lists, letters in institution symbols appear in uppercase or lowercase. An uppercase symbol indicates that the institution participates in the WorldCat Resource Sharing service as a lender of library materials. A lowercase symbol indicates that the institution does not lend materials via WCRS. Users creating a loan request in WCRS can include uppercase symbols in the list of potential lenders.</p>
Display Local Holdings	<ol style="list-style-type: none"> On the View list, click Display Local Holdings or press <Alt><K><\> (backslash) (or <Alt><J> and then <\>). In the Local holdings type list, select the display to view: For Institution Holdings or Group Holdings, type the institution or group symbol in the text box. Or select State Holdings, Region Holdings, Default Holdings, or All Holdings. Click Display Local Holdings. <p>Results</p> <p>The Holdings Display window lists summary local holdings for an institution or group, or for institutions in the category you selected (state, region, default, all). In the Holdings Display window, under Local Holdings Information, click the link to the holdings summary for the institution you want.</p>

Action	How To
Display Find in a Library	<p>On the View list, click Display Find in a Library or press <Alt><K> and then <8> (or <Alt><J> and then <8>).</p> <p>Result: Connexion displays the Find in a Library® service at WorldCat.org in a new window. Use the screen to locate WorldCat libraries that hold the work described in the current record and to link directly to library OPACs. You can also access cover art, information on alternative formats (large print, audiobooks, etc.), user reviews and other evaluative content.</p>
Export record	<ul style="list-style-type: none"> • On the Action list click Export Record in MARC or Export Record DC HTML or Export Record DC RDF. Or • MARC. Press <Alt><K> and then <E>. • DC HTML. Press <Alt><K> and then <*>. • DC RDF. Press <Alt><K> and then <(>. <p>Results</p> <ul style="list-style-type: none"> • Validation. By default, Connexion does not validate bibliographic 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. • The system changes the record's Export status to C (Completed) or F (Failed).
View Label in Label Program MARC view only (Not available for locked master record)	<p>Requires that you install the OCLC Cataloging Label Program (version 1.22 or later) on your workstation.</p> <ol style="list-style-type: none"> 1. Retrieve the bibliographic record for which you want to print labels. 2. Edit the record as you wish. For example: add or modify a call number, add an input stamp in the 049 field, or edit text in author (1xx) or title (245 \$a) fields. 3. On the View list, click View Label in Label Program or press <Alt><K> and then <Y>. <p>Results</p> <ul style="list-style-type: none"> • The system extracts data from the record and downloads the text to your workstation. • The OCLC Cataloging Label Program starts automatically (if it is not already running). • The Label Program displays the label set using the label format you specified in Connexion Cataloging Options. • In the record, the system sets the Label action status to C (Completed).

Take Actions on Bibliographic Records

Action	How To
Flag record	On the Action list, click Flag Record . The record remains flagged during the current session or until you unflag it. Note: You cannot flag a new record (not yet added to WorldCat, no OCLC control number). Note: You cannot flag a record retrieved from WorldCat.
UnFlag record	On the Action list, click Unflag Record .

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 bibliographic save file. Other actions are not available for a new record (without an OCLC control number).
- The hierarchy of authorizations from least to most record actions included is as follows:
 - Search
 - Limited
 - Full
 - Authorizations for those who participate in special projects or services, such as NACO (Name Authority Cooperative), Enhance, or CONSER (Cooperative Online Serials) program.

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Update Holdings (add new record)	Add a new record to WorldCat and add your library's OCLC symbol.	Full	Yes	No	No
Derive New Constant Data Record	Add a copy of the record to your institution's constant data database.	Limited	No	No	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 bibliographic record you are editing. Choose to apply the whole CD record, fixed field only, or variable fields only.	Limited	Yes	Yes	No

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
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 WorldCat, in display mode. Any locks on the record are released. New record (saved). The system redisplay the record from the bibliographic save file. New record (unsaved). The system deletes the record and returns you to the Create Record screen.	Limited	Yes	Yes	No
Control All Headings	Add authority control for all controllable fields in the record.	Limited	Yes	Yes	No
Create Local Holdings	Link a new local holdings record to the bibliographic record.	Full	No	Yes	No
Delete Holdings (if library has holdings)	Remove your library's OCLC symbol from the record.	Full	No	Yes	No
Delete All Local Holdings	Remove any LHRs your library has linked to the record. Option to delete your OCLC symbol from the record.	Full	No	Yes	No
Delete Save File Record (saved record only)	Remove record from the bibliographic save file.	Limited	Yes	Yes	No
Derive New Record	Create a new record based on the current record.	Limited	No	Yes	Yes

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Display Holdings	View a list of libraries whose OCLC symbols are attached to the record.	Search	Yes	Yes	Yes
Display Local Holdings	View a list of libraries that have local holdings records attached to the record.	Search	Yes	Yes	Yes
Display Record	View record as presented when first retrieved.	Search	Yes	Yes	No
Edit Local Holdings	Edit local holdings record(s) your library has attached to the record.	Full	No	Yes	No
Edit Record (saved records only)	Begin editing a saved record (in master edit mode if the record is locked, in local edit mode if unlocked)	Limited	Yes	Yes	Yes
Edit Record	Modify a working copy of the record without affecting the master record.	Limited	Yes	No	Yes
Export Record in [MARC, DC, etc.] (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
Lock Master Record	Lock and modify the master copy of the record.	Limited	No	Yes	Yes
Mark for Export	Indicate a record is ready to export.	Limited	Yes	Yes	No
Mark for Label	Indicate a record is ready for use to create labels.		No	Yes	No
Reformat Record	Refresh the edit view to reorder fields.	Limited	Yes	Yes	No
Release Record Lock	Unlock a locked master record. Retain changes made while editing. Switch to local edit mode.	Limited	Yes	No	No

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
Replace Record (existing record only)	Overwrite the master record with your modified working copy. (Only for specific records and purposes, as defined by your authorization.)	Full	Yes	No	No
Replace and Update Holdings (existing record only)	Replace the master record and add your library's OCLC symbol. (Only for specific records and purposes, as defined by your authorization.)	Full	Yes	No	No
Report Error	Report an error in the record by via e-mail.	Limited	Yes	Yes	Yes
Save Record	Place the record in the bibliographic save file. Or resave the record in the save file; restart save file aging for the record.	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
Flag Record	Mark the record to set it aside for further use during the current session.	Search	Yes	Yes	Yes
Unedit Record	The system redisplay the record as originally retrieved from WorldCat (for an unsaved record) or as last saved (if the record is in the save file). The record remains in the edit mode you were using. Any locks are retained.	Limited	Yes	Yes	No

Take Actions on Bibliographic Records

Action	What it does	Minimum Auth Level	Locked Master Record ?	Edit Mode?	Display Mode?
UnFlag Record	Remove a flag from the record.	Search	Yes	Yes	Yes
Update Holdings	Add your library's OCLC symbol to the record.	Full	No	Yes	No
Validate Record	Check the content and format of the record using OCLC WorldCat validation rules.	Limited	Yes	Yes	No
View Label in Label Program (Requires Label Program 1.22 or later installed on workstation)	Display a label set for the current record in the OCLC Cataloging Label Program.	Limited	No	Yes	Yes