

## Create Bibliographic Records

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## Revision History

<b>Date</b>	<b>Section title</b>	<b>Description of changes</b>
February 2004	3. Create a record from an existing record	Revised to document new functionality for deriving records: ability to select variable fields to transfer and to choose whether to transfer all fixed-field values or default values only.
May 2006	Sections 4 and 6	Revised to reflect updated interface and enhanced functionality for creating records by extracting metadata from electronic resources.
	Section 5	Revised to reflect changes made to implement recent MARC 21 updates.
November 2006	Sections 4 and 6	Revised to reflect enhanced functionality for creating records by extracting metadata from electronic resources.
April 2012	2. Create a record from a workform	Added the option to use RDA workforms

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## 1 Create a bibliographic record

### About new bibliographic records

- The system assigns an OCLC control number to each new record; the same number uniquely identifies the record in WorldCat .
- You can retrieve bibliographic records by searching WorldCat
- WorldCat validation rules are applied to new records.
- You cannot export a new record not yet added to WorldCat; only records with OCLC control numbers can be exported.

### Review guidelines for new records

You should be familiar with the guidelines found in chapter 4, “When to Input a New Record”, of OCLC Bibliographic Formats and Standards, available online at < <http://www.oclc.org/bibformats/en/input/index.shtm> >

### Check for and review existing records

Before creating a new record, by any method, search WorldCat for existing records that describe the item.

- Search using various search strategies (author, title, publisher, URL, or other methods based on distinctive information you have).

If you find	Then
Record exactly matching the item you are describing	<ul style="list-style-type: none"> <li>• Use the record as is (for example, to set holdings or to export). Or</li> <li>• Edit (revise) an existing record to correct or expand information about the item.</li> </ul>
Record nearly matching the item you are describing	Derive a new record to reuse information that applies to the item you are describing and then revise the derived record as needed.
No matching records	Create a new record.

### Create record

You can create a bibliographic record in 3 ways:

1. Derive a new record from an existing record and modify content as necessary (save keystrokes by reusing appropriate data).
2. Enter content for each field in a blank workform.
3. Begin with fields extracted or generated from the Web page for the item (extracting).

### Constant data

- To save keystrokes when creating or revising records, create **constant data records**. In each constant data record, enter notes and other data you use frequently when creating or editing a particular category of bibliographic record. For details on creating and using constant data, search Help for the topic **constant data**.
- If you derive a new record from an existing record or create a record from a blank edit view (workform), use the **Apply Default CD** action to incorporate constant data.

Or use **Apply CD By Name** or **Apply CD From List** to retrieve and apply a stored constant data record.

- If you create a bibliographic record by extracting metadata from a Web resource, you can choose to merge your default constant data with the extracted/generated information Connexion supplies in the base record.

### Add record or save for later completion

#### Add record to WorldCat

- Finish editing the new record and validate it. Correct any validation errors.
- **Prevent duplicate records.** Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the item since you began working on your record.
- If you find no existing record, take the **Update Holdings** or **Produce and Update Holdings** or **Alternate Produce and Update** action to add it to WorldCat and set your library's holdings.

#### Save record

- Take the **Save Record** action to place the record in the bibliographic save file for further review and/or editing.

#### Caution

- If you log off without saving the new record or adding it to WorldCat, your record is lost.

## 2 Create bibliographic record from a workform

### Why use a workform?

- Catalog an item in any bibliographic format.
- Describe an electronic resource whose content is not in HTML, such as a collection of Portable Document Format (PDF) files, image files, or audio files.

### Use a workform to create a new bibliographic record

	Action
1	<p>Before creating a new record, search WorldCat for existing records that describe the item.</p> <p>You can Search WorldCat using various search strategies based on distinctive information you have.</p> <p>Or If cataloging a Web-based item, use the option on the Create Record screen to search WorldCat for the URL of the item before accessing the site to create a record.</p>
2	<p>On the Cataloging tab, under Create Options, click <b>Single Record</b>. The Create Record screen appears.</p>
3	<p>At the top of the screen, check the format shown in the text box (MARC Template or MARC Text Area or DC Template or DC Text Area). To change the record format, open the list and click the format you want to use.</p>
4	<p>Select the option button labeled <b>Use the [_____] workform</b>. Open the list of workforms and click the workform you want to use.</p> <p><b>Record format determines workforms available</b></p> <ul style="list-style-type: none"> <li>• <b>MARC format:</b> Books, Computer Files, Maps, Mixed Materials, Scores, Serials, Sound Recordings, Visual Materials</li> <li>• <b>Default MARC workform:</b> Books</li> <li>• <b>Dublin Core format:</b> Collection; Collection, instructional; Computer file; Computer software; Electronic journal; Electronic online service; Image data/ Image data, moving; Map data; Map data, manuscript; Physical object; Sound data, musical; Sound data, nonmusical; Text data; Text data, manuscript; Text data, music; Text data, music manuscript</li> <li>• <b>Default Dublin Core workform:</b> Text data</li> </ul>
5	<p><b>(Optional) Apply Default Constant Data.</b> To merge content from your default constant data record into the workform, select the check box labeled <b>Apply Default Constant Data</b>. <b>Default setting:</b> check box not selected; The system does not add default constant data.</p>
6	<p>Click <b>Create</b>. A blank workform of the type you selected appears.</p> <p><b>MARC workforms</b> contain the following default variable fields based on your cataloging profile:</p> <ul style="list-style-type: none"> <li>• Empty call number field appropriate for your profiled classification scheme. One of the following fields is inserted: 055, 070, 080, 086, 090, 092, or 096.</li> <li>• Field 040 containing your institution symbol in subfields ‡a and ‡c.</li> <li>• Field 049 containing you default holding library code.</li> </ul>

	Action
7	<p>Enter content to create an accurate description of the item. If appropriate, apply constant data to the new record.</p> <ul style="list-style-type: none"> <li>On the Edit list click <b>Apply Default CD</b> to apply your default constant data.</li> <li>Or</li> <li>On the Edit list click <b>Apply CD By Name</b> or <b>Apply CD From List</b> to apply a specific constant data record.</li> </ul>
8	<p>Add the record to WorldCat. Go to step 9 for instructions. Or Save the record for further processing and/or review.</p> <ol style="list-style-type: none"> <li>Open the Action list and click <b>Save Record</b> to add the record to the bibliographic save file.</li> <li>Assign a workflow status appropriate for the record's position in your cataloging workflow.</li> <li>If desired, enter a note or identifier in the My Status text box.</li> <li>When you save the record, the system assigns the source status <b>Workform</b>.</li> </ol>
9	<p>Add the new record to WorldCat.</p> <p><b>Prevent duplicate records</b></p> <ul style="list-style-type: none"> <li>Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the item since you began working on your record.</li> </ul> <p><b>Add record</b></p> <ul style="list-style-type: none"> <li>If you find no existing record, open the Action list and click <b>Update Holdings</b> or <b>Produce and Update Holdings</b> or <b>Alternate Produce and Update</b>.</li> </ul> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>Connexion validates the record. If the system reports validation errors, correct them and retry adding the record.</li> <li>When the record is valid, Connexion adds it to WorldCat, sets your holdings, and assigns an OCLC control number.</li> <li>Your copy of the record is displayed in local edit mode. Local data fields you added to the record are retained in your copy.</li> </ul> <p><b>Notes: Adding saved record</b></p> <ul style="list-style-type: none"> <li><b>Saved record deleted after add.</b> If you retrieved the new record from the 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.</li> <li><b>Save file numbers reused.</b> When you resave the record, the system may assign the (reused) slot number previously used for the deleted record.</li> <li><b>Flag removed.</b> However, any flag on the deleted record is lost. To include the resaved record in a group flagged for further processing, you must reflag the resaved record.</li> </ul>

**Optional: Use RDA-based workforms**

Default workforms for creating bibliographic records are based on Anglo-American Cataloging Rules (AACR2). You can choose instead to use workforms based on Resource Description and Access (RDA) by setting an option in **General tab > Preferences > RDA Options**.

Once you set the option, when you click **Cataloging tab > Create Options > Single Record**, and the Create Record screen opens, a confirmation label, **Using RDA Workforms**, appears below the **Apply default constant data** check box.

If you use RDA workforms, you can also set an option in the RDA Options in Preferences to enable showing RDA field descriptions for variable fields. You must be an RDA subscriber and enter your RDA Toolkit logon information in the RDA Options screen.

Once you set the option and enter your information, to see an RDA Toolkit field description:

- With the cursor in a variable field, click **RDA Toolkit** in the **Functions** list for the field.

### Notes about the Toolkit:

- If you are not a subscriber but you are interested in subscribing, see details on the RDA Toolkit Subscribe Web page at <http://www.rdatoolkit.org/subscribe>.
- For general information, see the RDA Toolkit Web site at <http://www.rdatoolkit.org/>.
- For more about RDA cataloging, see Information and Resources in Preparation for RDA on the Library of Congress Web site at <http://www.loc.gov/aba/rda/>.

### Constant data

To save keystrokes when creating or revising records, create **constant data records**. In each constant data record, enter notes and other data you use frequently when creating or editing a particular category of bibliographic record. For details on creating and using constant data, search Help for the topic **constant data**.

### 3 Create new bibliographic record from an existing record

**Why derive a new record?**

- Reuse applicable content from a record that describes an item similar to the one you are cataloging.
- Save keystrokes and reduce errors.

**Derive new bibliographic record from retrieved record or workform**

	<b>Action</b>
1	<p>Retrieve a record that describes an item that resembles or is related to the item you are cataloging.                      You can also derive a new record from an edited or unedited workform.                      View the full record.</p>
2	<p>1. On the Edit list click <b>Derive New Record</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;D&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;D&gt;).                      2. When the system asks whether you want to transfer fixed-field values to the new record,                      — Click <b>Yes</b> to transfer all fixed-field values except the OCLC control number, <b>Rec Stat</b>, <b>Entered</b>, and <b>Replaced</b>. <b>Rec Stat</b> is set to Q (New). Both <b>Entered</b> and <b>Replaced</b> are set to the current date,                      — Click <b>No</b> to transfer only default fixed-field values for the format, as indicated by the value in the <b>Type</b> element.                      — Click <b>Cancel</b> to cancel deriving a new record.</p> <p><b>Results</b>                      The system displays the content of the new record.                      Variable fields transfer based on your settings for the <b>Derive Record Fields</b> option (Cataloging Options screen).  <b>NEW</b> appears in place of an OCLC control number.</p>
3	<p>Edit the record to describe the item you are cataloging.                      If appropriate, change the MARC format for the new record to match the item you are cataloging.</p> <ul style="list-style-type: none"> <li>• Select the desired format from the list in the fixed-field area of the record.</li> </ul> <p>If appropriate, apply constant data to the new record.</p> <ul style="list-style-type: none"> <li>• On the Edit list click <b>Apply Default CD</b> to apply your default constant data.                      Or</li> <li>• On the Edit list click <b>Apply CD By Name</b> or <b>Apply CD From List</b> to apply a specific constant data record.</li> </ul>

	<b>Action</b>
4	<p>Add the record to WorldCat. Go to step 5 for instructions. Or Save the record for further processing and/or review.</p> <ol style="list-style-type: none"> <li>1. Open the Action list and click <b>Save Record</b> to add the record to the bibliographic save file.</li> <li>2. Assign a workflow status appropriate for the record's position in your cataloging workflow.</li> <li>3. If desired, enter a note or identifier in the My Status text box.</li> <li>4. When you save the record, the system assigns the source status <b>Derived</b>.</li> </ol>
5	<p>Add the new record to WorldCat.</p> <p><b>Prevent duplicate records</b></p> <ul style="list-style-type: none"> <li>• Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the resource since you began working on your record.</li> </ul> <p><b>Add record</b></p> <ul style="list-style-type: none"> <li>• If you find no existing record, open the Action list and click <b>Update Holdings</b> or <b>Produce and Update Holdings</b> or <b>Alternate Produce and Update</b>.</li> </ul> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Connexion validates the record. If the system reports validation errors, correct them and retry adding the record.</li> <li>• When the record is valid, Connexion adds it to WorldCat, sets your holdings, and assigns an OCLC control number.</li> <li>• Your copy of the record is displayed in local edit mode. Local data fields you added to the record are retained in your copy.</li> </ul> <p><b>Notes: Adding saved record</b></p> <ul style="list-style-type: none"> <li>• <b>Saved record deleted after add.</b> If you retrieved the new record from the 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.</li> <li>• <b>Save file numbers reused.</b> When you resave the record, the system may assign the (reused) slot number previously used for the deleted record.</li> <li>• <b>Flag removed.</b> However, any flag on the deleted record is lost. To include the resaved record in a group flagged for further processing, you must reflag the resaved record.</li> </ul>

**Content transferred to derived record**

**Variable fields: default.** Connexion transfers and/or supplies the following variable fields to the new record:

- MARC fields with tag numbers from 1xx to 8xx.
- MARC field 040: subfields **a** and **c** containing the OCLC symbol of the institution that derives the record.
- Default variable fields based on your cataloging profile:
  - Empty call number field appropriate for your profiled classification scheme. One of the following fields is inserted: 055, 070, 080, 086, 090, 092, or 096.
  - Field 049 containing you default holding library code
- Links to controlled headings.

**Fixed field: default.** Connexion transfers default fixed-field values for the format, as indicated by the value in the **Type** element, with the following exceptions and modifications:

- Values for Type and Blvl match values in the source record.
- Srce is set to G.
- DtSt for nonserials is set to a fill character (■) and Date1 is set to 4 fill characters. Date2 is set to 4 blanks. In DC views, DtSt is set to Q; both Date1 and Date2 are set to XXXX.
- DtSt for serials (records with Blvl V) is set to F. Date1 is set to 4 fill characters; Date2 is set to 9999. In DC views, DtSt is set to X; both Date1 and Date2 are set to XXXX.
- In MARC views, Elvl is set to a fill character (■). In DC views, Elvl is set to .

### User options (MARC only)

- **Variable fields.** You can select which variable fields to transfer. You can add fields to the set transferred by default and/or remove fields from the default list. To select variable fields, use the **Derive Record Fields** option (Cataloging Options screen)
- **Fixed field.** Each time you derive a new record, you can decide whether to transfer only default fixed-field values or to transfer all fixed-field values from the base record except the OCLC control number, **Rec Stat**, **Entered**, and **Replaced**

### Connexion does not transfer or supply:

- OCLC control number: the word NEW replaces the control number.
- Fixed-field elements **Rec Stat**, **Entered**, and **Replaced**. **Rec Stat** is set to Q (New); **Entered** and **Replaced** are set to the current date,
- Holdings data attached to a bibliographic record.
- MARC fields in the 01x tag group: 010, 012, 013, 015, 016, 017, 018, and 019.
- MARC fields 029, 042, 066, 850, 886, 887, 938, 956, and 987.
- If you choose to transfer all fixed-field values to the new record, review the resulting record carefully. .
- In particular, verify that the values for **ELvl**, **Srce**, **DtSt**, and **Dates** are appropriate for the item you are cataloging.

**Tip: Review transferred fixed-field values**

## Create Bibliographic Records

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### **Tip: Derive from record in another language**

- Review content for text transferred from the original record that requires translation to match the language of the deriving library.
- For example, descriptive content, notes, and subject headings may require translation.
- You may retain subject headings in the language of the base record. However, consider adding headings in the language best suited for likely users of the record.

### **Constant data**

To save keystrokes when creating or revising records, create **constant data records**. In each constant data record, enter notes and other data you use frequently when creating or editing a particular category of bibliographic record. For details on creating and using constant data, search Help for the topic **constant data**.

## 4 Create a single record by extracting metadata from an electronic resource

### Why use extracted data to create a record?

- Save the time and effort otherwise required to transcribe bibliographic information from the resource.
- You can extract metadata from the following resource types: Hypertext Markup Language (\*.htm or \*.html), Adobe Portable Document Format (.pdf), Microsoft® Word document (\*.doc), or MP3 audio file (.mp3).
- Produce a preliminary record for a supported resource type, whether the resource is Web-accessible or locally stored (e.g., a file located on a disk drive at your library).
- Use automated tools to supply DDC classification numbers.

### Extract metadata from an electronic resource to create a single bibliographic record

	Action
1	On the Cataloging tab, under Create Options, click <b>Extract Metadata</b> . The Extract Metadata screen appears. Use the <b>Single Record</b> area (top of the screen).
2	Specify the location for the resource to extract. Select <b>Extract data from URL</b> or <b>Extract data from local file</b> . <b>Default setting: Extract data from URL</b> selected.
3	Supply the path to the electronic file for the resource. <ul style="list-style-type: none"> <li>• <b>URL.</b> In the text box, specify the URL for the resource. You can type the URL, or copy and paste the text in the box. The URL can point to a <b>site</b> (that is, a home page) or to a <b>specific page</b> within a site. You must include the prefix <b>http://</b> or <b>https://</b>.</li> <li>• <b>Local file.</b> In the text box, specify the complete path and the filename for the resource file. You can type the path and file name, or copy and paste the text in the box. To prevent errors in typing or syntax, click <b>Browse</b> to find the file on your workstation or network drive.</li> </ul>
4	<p><b>(Optional) Generate Dewey classification numbers.</b>                      To use classifier software that analyzes the text of the resource and attempts to assign Dewey Decimal Classification (DDC) numbers, select the check box labeled <b>Generate Dewey numbers</b>.                      To turn off automatic classification, clear the check box.  <b>Default setting:</b> check box cleared; the system does not try to assign Dewey numbers.</p> <p><b>Note:</b> You do not need a Dewey Services authorization to use Generate Dewey numbers. For any user, Connexion assigns DDC class numbers and inserts them in the new record. For Dewey Services subscribers, Connexion hyperlinks the inserted class numbers to the DDC record in WebDewey or Abridged WebDewey.</p> <p><b>Note:</b> In the new record, auto-assigned DDC numbers appear in a 699 field (MARC views) or a Subject.classAuto.DDC element (Dublin Core views).</p>

	<b>Action</b>
5	<p><b>(Optional) Apply Default Constant Data.</b> To merge content from your default constant data record with content extracted from the resource, select the check box labeled <b>Apply Default Constant Data</b>. <b>Default setting:</b> check box not selected; the system does not add default constant data.</p>
6	<p>Click <b>Create</b>.</p> <p><b>Results:</b></p> <ul style="list-style-type: none"><li>• The system locates the resource, extracts information, and (if specified) attempts to automatically classify it.</li><li>• The resulting preliminary record is created using an appropriate workform and appears in your default editing view.</li><li>• Fields in the workform contain extracted content, content from constant data, My Status (if specified) , or generated content (Dewey numbers).</li><li>• The system may automatically insert fields, fixed-field codes, standard notes, or other default content. See the next section for details.</li></ul>

	<b>Action</b>
7	<p>Edit the new record to create an accurate description of the resource. If appropriate, apply constant data to the new record.</p> <ul style="list-style-type: none"> <li>On the Edit list click <b>Apply Default CD</b> to apply your default constant data.</li> <li>Or</li> <li>On the Edit list click <b>Apply CD By Name</b> or <b>Apply CD From List</b> to apply a specific constant data record.</li> </ul> <p>Then add the record to WorldCat. Go to step 8 for instructions.</p> <p>Or</p> <p>Save the record for further processing and/or review.</p> <ol style="list-style-type: none"> <li>On the Action list click <b>Save Record</b> to add the record to the bibliographic save file.</li> <li>Assign a workflow status appropriate for the record's position in your cataloging workflow.</li> <li>If desired, enter a note or identifier in the My Status text box.</li> <li>When you save the record, the system assigns the source status <b>Extracted</b>.</li> </ol>
8	<p>Add the new record to WorldCat.</p> <p><b>Prevent duplicate records</b></p> <ul style="list-style-type: none"> <li>Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the resource since you began working on your record.</li> </ul> <p><b>Add record</b></p> <ul style="list-style-type: none"> <li>If you find no existing record, on the Action list click <b>Update Holdings</b> or <b>Produce and Update Holdings</b> or <b>Alternate Produce and Update</b>.</li> </ul> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>Connexion validates the record. If the system reports validation errors, correct them and then try again to add the record.</li> <li>When the record is valid, Connexion adds it to WorldCat, sets your holdings, and assigns an OCLC control number.</li> <li>Your copy of the record is displayed in edit mode. Local data fields you added to the record are retained in your copy.</li> </ul> <p><b>Notes: Adding saved record</b></p> <ul style="list-style-type: none"> <li><b>Saved record deleted after add.</b> If you retrieved the new record from the 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.</li> <li><b>Save file numbers reused.</b> When you resave the record, the system may assign the (reused) slot number previously used for the deleted record.</li> <li><b>Flag removed.</b> However, any flag on the deleted record is lost. To include the resaved record in a group flagged for further processing, you must reflag the resaved record.</li> </ul>

**Results of metadata extraction: details**

Connexion locates the electronic resource(s), creates workforms, inserts data from the resource(s), and makes other changes, depending on options you select.

- Extracts exact data (as is) from standard or widely used metadata tags that are explicitly embedded in the .html or .htm file, or in the properties of the .doc, .pdf, or .mp3 file.

**Note:** You can often view the metadata tags in an .html or .htm file by viewing the source code. In Internet Explorer, for example, open the file, open the View menu, and click **Source**.

- Creates workforms in the following MARC formats and inserts language, date, copyright, title, and keyword data:
  - HTML format (.html or .htm)**. Inserts the data into a Continuing Resources workform instead of a Books workform, and codes the workform as an integrating resource (Type: a/BLvl: i). An updating web site is an example of an integrating resource.
  - PDF or DOC files (.pdf or .doc)**. Inserts the data into a Books workform (Type: a/BLvl: m).
  - MP3 files (.mp3)**. Inserts the data into a Sound Recordings workform (Type: j). You must change Type: from "j" to "i" if the file is not music.
- Adds standardized note fields required by AACR2:
  - HTML  
500 field (both indicators blank) as Title from caption (viewed on [current date]).
  - PDF  
500 field (both indicators blank) as Title from title screen (viewed on [current date]).  
And  
538 field (both indicators blank) as System requirements: *Adobe Reader*.
  - Any file type extracted from a fully qualified Web source (begins with **http://**), not a local source  
538 field (both indicators blank) as Mode of access: World Wide Web.
- Adds field 007 for electronic resources to records extracted from all supported file types, with the following subfield data: \$a c; \$b r; \$d u; \$e n.
- When exact data is not available from metadata tags or the properties, the system generates data from an analysis of the text or other elements of the file.
- Generates Dewey classification numbers (if specified) through analysis of the text by classifier software.
- Adds data from your default constant data (if specified).

### Basic record creation process

Connexion's metadata extraction function creates a preliminary bibliographic record (one record or multiple records) as described in the following table.

## Create Bibliographic Records

	Action
1	Accesses the electronic resource at the location you specified (either a URL or a local drive, path, and filename).
2	Verifies that the resource is in a supported file format (HTML, PDF, MS <sup>®</sup> Word, or MP3).
3	Extracts content of the resource and parses the content to identify metadata (titles, author, publisher, dates, abstracts, language, etc.) appropriate for a bibliographic record.
4	Maps usable content to appropriate points in the record template, applying OCLC-defined rules of precedence and other processing rules.
5	If requested, attempts to classify the resource and assign Dewey Decimal Classification numbers.
6	If requested, inserts your default bibliographic constant data. When creating multiple records from resources linked to a Web site/page, the system inserts the My Status identifier you requested (if any).
7	Displays the new bibliographic record in your preferred edit view (MARC or Dublin Core, template or text area).

### Constant data

To save keystrokes when creating or revising records, create **constant data records**. In each constant data record, enter notes and other data you use frequently when creating or editing a particular category of bibliographic record. For details on creating and using constant data, search Help for the topic **constant data**.

### Check records created from extracted information

This section lists areas of the extracted record to check for incorrect content and/or formatting.

Field/Element	Problem	Explanation	Correction
MARC: 653 Dublin Core: Subject [Unqualified]	Depending on format of content in < META NAME keywords >, field 653 may be formatted incorrectly.	Keywords separated by commas are placed in separate \$a subfields in 653 (correct MARC coding). Keywords separated by blanks are placed in a single \$a (incorrect).	Create a \$a for each keyword if necessary.

Field/Element	Problem	Explanation	Correction
MARC: 500 Dublin Core: Coverage [Unqualified]	In MARC view, some data will be squeezed to the far right of the screen.	Underlying HTML code may have been extracted.	Switch to MARC Text Area view. Delete the extraneous HTML code.
MARC: 699 Dublin Core: Subject.class Auto.DDC	Content of some automatically generated Dewey class number fields may be erroneous.	The system attempts to formulate subject terms and assign a DDC number based on the content of the screen. It sometimes misinterprets the content.	Delete the erroneous field. Or Edit the content of the field to correct errors.
All extracted or generated data	Errors in content or in formatting can occur for a variety of reasons.	Many factors affect the quality of extracted output: the amount of text on the page, the presence or absence of metadata (META tags) in the page header, etc.	Delete the erroneous field. Or Edit the content of the field to correct errors.

**Tip: Extracting from a framed Web page or site**

- Some Web sites use a frameset to organize content and provide links to the main areas of the site. A frameset is a page structured in separate, independently scrollable sections (frames). Each frame displays the contents of a separate HTML file. Framesets may be used on home pages or on pages within a site.
- The function that extracts data for a single record does not fail if you supply a URL for a frameset. Connexion displays a bibliographic workform with default content and possibly a title. However, this record is not useful; it does not describe the content you want to catalog.
- Make sure you obtain the **specific URL** for the site's main content frame. Then supply that URL for extraction.

## Create Bibliographic Records

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	Action
1	Navigate to the site you want to use to create a record.
2	Place the mouse pointer over the frame from which you want to extract data (the main content frame). Right-click in the frame.
3	<p><b>Internet Explorer.</b> On the pop up menu, click <b>Properties</b>. In the Properties dialog box, in the <b>Address (URL)</b> area, highlight the URL, copy it, and then paste it into the URL text box on the Extract Metadata screen.</p> <p><b>Netscape Navigator.</b> On the pop up menu, click <b>View Frame Info</b>. A Page Info window opens. At the top of the Page Info window, a list of links appears. Highlight and copy the first link listed and paste it into the URL text box.</p>

## 5 New bibliographic records: details

### MARC fixed field default values

The table lists values supplied for fixed-field (008) elements in workforms. Connexion also supplies these defaults when you change the record type (Type) in a record. When you add an 006 field (MARC views only), Connexion supplies the defaults for the Type of 006 you specify. For example, you will see these default values in records that you create or modify in the following ways:

- Use the Extract Metadata function (Cataloging tab, Create Options, Extract Metadata) to create preliminary bibliographic records by extracting content from electronic resources.
- In a bibliographic record in MARC view, select a record type from the list labeled Fixed Field. Or, on the Create Record screen (Cataloging tab, Create Options, Single Record), choose a MARC view and then select a workform.
- In a bibliographic record in Dublin Core view, specify OCLC Genre (OCLCg) as the scheme for the Type element and then use the list of genres to specify the category of resource. Or, on the Create Record screen (Cataloging tab, Create Options, Single Record), choose a Dublin Core view and then select a workform. In MARC view, Connexion maps the OCLC Genre term to a MARC record type and supplies the appropriate fixed field values.
- **Note: Default values in DC view** The following table lists MARC default values only. The default values supplied in DC view differ. To see how the DC values are mapped to MARC, create a workform in DC view and then switch to MARC.
- In the table, the following conventions are used: an **empty cell** means that the element is not applicable to a MARC format; an **uppercase B** represents a blank character; and a **vertical bar** represents a fill character.

Mnemonic	Name	BKS	CN R	VIS	MIX	MAP	SCO	REC	COM
AccM	Accompanying Matter						BBB BB	BBB BB	
Alph	Original Alphabet or Script of Title		B						
Audn	Target Audience	B		B			B	B	B
Biog	Biography	B							
BLvl	Bibliographic Level	m	s	m	c	m	m	m	m
Comp	Form of Composition						uu	uu	
CNR	Conference Publication								
Cont	Nature of Contents	BBB B	BBB						

## Create Bibliographic Records

Mnemonic	Name	BKS	CN R	VIS	MIX	MAP	SCO	REC	COM
CrTp	Type of Cartographic Material					a			
Ctrl	Type of Control	B	B	B	B	B	B	B	B
Ctry	Country of Publication, Etc.								
Dates	Date 1 Date 2	 BBB B	 999 9	 BB BB	 BB BB	 BBB B	 BBB B	 BBB B	 BBB B
Desc	Descriptive Cataloging Form								
DtSt	Type of Date/ Publication Status		c						
ELvl	Encoding Level								
Entered	Date Entered	System supplies current date							
EntW	Nature of Entire Work		B						
Fest	Festschrift	0							
File	Type of Computer File								u
FMus	Format of Music						u	n	
Form	Form of Item	B	B	B	B	B	B	B	
Freq	Frequency								
GPub	Government Publication	B	B	B		B			B
Ills	Illustrations	BBB B							
Indx	Index	0				0			
Lang	Language Code								
LitF	Literary Form	0							
LTxt	Literary Text for Sound Recordings						nB	BB	
MRec	Modified Record Code	B	B	B	B	B	B	B	B
OCLC	OCLC Control Number	System supplies NEW							

## Create Bibliographic Records

Mnemonic	Name	BKS	CN R	VIS	MIX	MAP	SCO	REC	COM
Orig	Form of Original Item		B						
Part	Music Parts						B	n	
Proj	Projection					BB			
Rec stat	Record Status	n	n	n	n	n	n	n	n
Regl	Regularity								
Relf	Relief					BBB B			
Replaced	Date of Last Replace	System supplies current date							
S/L	Successive/ Latest Entry		0						
SpFm	Special Format Characteristics					BB			
Srce	Cataloging Source Code	d	d	d	d	d	d	d	d
SrTp	Type of Serial		B						
Time	Running Time (1)								
Tech	Technique			n					
TMat	Type of Material								
TrAr	Transposition and Arrangement						B	n	
Type	Type of Record	a	a	g	p	e	c	j	m

### Footnote

(1) Mandatory for motion pictures and videorecordings. Use nnn for other media

### OCLC Genre terms and MARC fixed field values

OCLC Genre term (OCLCg)	OCLC fixed field Type and coded value	Other fixed field values
Collection	Mixed Materials (MIX) p	
Collection, instructional	Visual Materials (VIS) o	TMat: b
Computer file	Computer File (COM) m	
Computer software	Computer File (COM) m	File: b

## Create Bibliographic Records

OCLC Genre term (OCLCg)	OCLC fixed field Type and coded value	Other fixed field values
Electronic journal	Continuing Resource (CNR) a	BLvl: s S/L: 0
Electronic online service	Computer File (COM) m	File: j
Image data	Visual Materials (VIS) k	TMat: i
Image data, moving	Visual Materials (VIS) g	TMat: v
Map data	Map (MAP) e	
Map data, manuscript	Map (MAP) f	
Physical object	Visual Materials (VIS) r	TMat: r
Sound data, musical	Sound Recording (REC) j	
Sound data, nonmusical	Sound Recording (REC) i	
Text data	Books (BKS) a	BLvl: m
Text data, manuscript	Books (BKS) t	
Text data, music	Scores (SCO) c	
Text data, music manuscript	Scores (SCO) d	
Text data, updating	Continuing Resource (CNR) a	BLvl: i S/L: 2 Form: s

## 6 Create multiple bibliographic records by extracting metadata from Web resources

Why create multiple records for Web-accessible resources?

- Streamline your workflow for cataloging online resources.
- Create records in the background while you continue with other activities.
- Ensure that records are created to describe all resources in a set or group.
- You can extract metadata from the following resource types: Hypertext Markup Language (\*.htm or \*.html), Adobe Portable Document Format (.pdf), Microsoft® Word document (\*.doc), or MP3 audio file (.mp3).

Create multiple preliminary records for Web resources

	Action
1	On the Cataloging tab, under Create Options, click <b>Extract Metadata</b> . The Extract Metadata screen appears. Use the <b>Multiple Records</b> area (bottom of the screen).
2	<p><b>Specify URL</b></p> <ul style="list-style-type: none"> <li>• In the text box, specify the URL for the Web page from which you want to create multiple records. You can type the URL, or copy and paste the text in the box.</li> <li>• The URL can point to a <b>site</b> (that is, a home page) or to a <b>specific page</b> within a site. You must include the prefix <b>http://</b> or <b>https://</b>.</li> </ul> <p><b>Note:</b> Connexion creates the records in the default bibliographic record view you specified on the Cataloging Options screen. To review or change the setting, on the General tab, click the <b>Admin</b> button. On the Preferences screen, click <b>Cataloging Options</b>.</p>
3	<p><b>(Optional) Skip URLs on web page</b></p> <ul style="list-style-type: none"> <li>• To prevent the system from processing the first links on a Web page, change the starting link number.</li> <li>• In the text box labeled <b>Create records for up to 100 URLs starting at link number</b>, type the number of the <b>first</b> link for which you want to create a record.</li> </ul> <p><b>Default setting: 1.</b></p>
4	<p><b>(Optional) Change redirected link options</b></p> <p>If the extraction function encounters a redirected link, it follows the redirect and extracts metadata from the site/page found at the new URL.</p> <ul style="list-style-type: none"> <li>• To prevent the extraction function from following redirected links, under Redirected Link Options, select the option button labeled <b>Skip redirected URL and continue processing</b>.</li> </ul> <p><b>Default setting: Follow redirects and extract from site/page.</b></p>
5	<p><b>(Optional) Choose the URL to insert in bibliographic records</b></p> <p>For URLs without redirects, the system inserts the original URL in the new bibliographic record, in field 856, subfield \$u.</p> <ul style="list-style-type: none"> <li>• After following a redirect and extracting metadata from the new URL, the system inserts the new URL, from which it extracted metadata, in 856 \$u.</li> <li>• To have the system always insert the original URL in the record, under the <b>Follow redirect</b> option, select <b>Insert original URL in 856 \$u</b>.</li> </ul> <p><b>Default setting: Insert URL of extracted site/page in 856 \$u.</b></p>

	<b>Action</b>
6	<p><b>(Optional) Generate Dewey classification numbers.</b>            To use classifier software that analyzes the text of the resource and attempts to assign Dewey Decimal Classification (DDC) numbers, select the check box labeled <b>Generate Dewey numbers</b>.            To turn off automatic classification, clear the check box.  <b>Default setting:</b> check box cleared; the system does not try to assign Dewey numbers.</p> <p><b>Note:</b> You do not need a Dewey Services authorization to use Generate Dewey numbers. For any user, Connexion assigns DDC class numbers and inserts them in the new record. For Dewey Services subscribers, Connexion hyperlinks the inserted class numbers to the DDC record in WebDewey or Abridged WebDewey.  <b>Note:</b> In the new record, auto-assigned DDC numbers appear in a 699 field (MARC views) or a Subject.classAuto.DDC element (Dublin Core views).</p>
7	<p><b>(Optional) Apply default constant data</b></p> <ul style="list-style-type: none"> <li>To apply your default constant data to all created records, select the check box labeled <b>Apply Default Constant Data</b>.</li> </ul> <p><b>Default setting:</b> check box not selected; the system does not add default constant data.</p>
8	<p><b>(Optional) Specify My Status options</b>            You can specify text to insert automatically in the My Status field of each created record. A distinctive My Status helps you retrieve the group of new records from the bibliographic save file.</p> <p>To insert My Status text in the created records, Under My Status for Created Records, select the appropriate option button:</p> <ul style="list-style-type: none"> <li><b>Insert URL of extracted site/page:</b> the system inserts the URL you entered at the top of the Create Multiple Records screen.</li> <li><b>Enter text to identify created records:</b> the system inserts text you enter in the text box provided below this option.</li> <li><b>Leave My Status blank:</b> the system does not insert any text in My Status fields of the new records.</li> </ul> <p><b>Default setting:</b> <b>Insert URL of extracted site/page.</b></p>
9	<p>Click <b>Create</b>.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>The system locates the Web page and builds a list of the first 100 links it contains, beginning with the link number you specified.</li> <li>On the Metadata Extraction Results screen, the system lists links for which you can create bibliographic records, under <b>Resources available for cataloging</b>.</li> </ul>
10	<p>Select the resources for which to create new records.            Click the URL to view the page and apply selection criteria.</p> <ul style="list-style-type: none"> <li>To create a record for a resource, select the check box in front of the URL.</li> <li>To select all available resources, click <b>Select All Resources</b> (at the end of the results page).</li> </ul>

	<b>Action</b>
11	<p><b>Verify e-mail address</b></p> <ul style="list-style-type: none"> <li>• At the end of the results page, verify that the text box shows the correct e-mail address.</li> <li>• Change the address if necessary.</li> </ul>
12	<p>Click <b>Create Selected Records</b>.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• The system displays a message to confirm that record creation is in progress.</li> <li>• For each selected resource, the system locates the site, extracts information, and takes the optional actions you specified: assigning Dewey classification numbers, applying constant data, and/or inserting My Status.</li> <li>• The system adds created records to the bibliographic save file with the source status <b>Extracted</b>.</li> <li>• The system sends you an e-mail message that lists URLs for which records were created, with the save file number assigned to each record.</li> <li>• Once you start the record-creation process, you can log off or switch to other tasks.</li> </ul>

Review and complete records

	Action
1	<p><b>Retrieve the Extracted records</b></p> <p><b>Show by Status</b></p> <ol style="list-style-type: none"><li>1. On the Cataloging tab, under Show Options, click <b>By Status</b>.</li><li>2. At the status list screen, under Show Save File, Source Status, click the check box for the <b>Extracted</b> status.</li><li>3. Click <b>Show Records</b>.</li></ol> <p>Or</p> <p><b>Search by status</b></p> <ol style="list-style-type: none"><li>1. On the Cataloging tab, under Search Options, click <b>Save File</b>.</li><li>2. On the Search Save File screen, at the bottom of the search form, open the Source Status list and click <b>Extracted</b>. Specify other search criteria if desired.</li><li>3. Click <b>Search</b>.</li></ol> <p>Or</p> <p><b>Search by My Status</b></p> <ol style="list-style-type: none"><li>1. On the Cataloging tab, under Search Options, click <b>Save File</b>.</li><li>2. On the Search Save File screen, in the <b>for</b> box at the top of the search form, type the My Status text you inserted in the created records.</li><li>3. Open the index list and click <b>My Status</b>.</li><li>4. Specify other search criteria if desired.</li><li>5. Click <b>Search</b>.</li></ol>

	Action
2	<p><b>View and edit each record</b></p> <ol style="list-style-type: none"> <li>1. Review the new records and delete any that you do not want to complete.</li> <li>2. Edit each new record to create an accurate description of the resource.</li> <li>3. To begin editing a record, at the results screen, click the hyperlinked entry number for the record.</li> <li>4. If appropriate, apply constant data to the new record. On the Edit list click <b>Apply Default CD</b>. Or click <b>Apply CD By Name</b> or <b>Apply CD From List</b> to apply a specific constant data record.</li> <li>5. While editing, you can change the workflow status to better reflect the record's position in your cataloging workflow. If desired, enter a note or identifier in the My Status text box.</li> </ol>
3	<p>Add the new record to WorldCat.</p> <p><b>Prevent duplicate records</b></p> <ul style="list-style-type: none"> <li>• Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the resource since you began working on your record.</li> </ul> <p><b>Add record</b></p> <ul style="list-style-type: none"> <li>• If you find no existing record, on the Action list click <b>Update Holdings</b> or <b>Produce and Update Holdings</b> or <b>Alternate Produce and Update</b>.</li> </ul> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Connexion validates the record. If the system reports validation errors, correct them and then try again to add the record.</li> <li>• When the record is valid, Connexion adds it to WorldCat, sets your holdings, and assigns an OCLC control number.</li> <li>• Your copy of the record is displayed in edit mode. Local data fields you added to the record are retained in your copy.</li> </ul> <p><b>Notes: Adding saved record</b></p> <ul style="list-style-type: none"> <li>• <b>Saved record deleted after add.</b> If you retrieved the new record from the 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.</li> <li>• <b>Save file numbers reused.</b> When you resave the record, the system may assign the (reused) slot number previously used for the deleted record.</li> <li>• <b>Flag removed.</b> However, any flag on the deleted record is lost. To include the resaved record in a group flagged for further processing, you must reflag the resaved record.</li> </ul>

**Tips for creating multiple bibliographic records**

- To skip the first **n** URLs on a page when creating records, specify a starting link number on the Create Multiple Records screen. In the text box, type the number of the **first** URL for which you want to create a preliminary record.
- You can log off after beginning record creation. The process is independent of your session.
- When you retrieve records with Extracted status, the system sorts the results by save file number. To change the sort order, open the Action/Sort list (top right corner of the results screen) and click **Sort by Ascending Date** or **Sort by Descending Date** or **Sort by Title**.

**Tip: Extracting from a framed Web page or site**

- Some Web sites use a frameset to organize content and provide links to the main areas of the site. A frameset is a page structured in separate, independently scrollable sections (frames). Each frame displays the contents of a separate HTML file. Framesets may be used on home pages or on pages within a site.
- The multiple record extracting function does not work properly if you supply a URL for a frameset. Connexion displays an error message and does not extract any data.
- Make sure you obtain the **specific URL** for the site's main content frame. Then supply that URL for extraction.

	Action
1	Navigate to the site you want to use to create multiple records.
2	Place the mouse pointer over the frame from which you want to extract links (the main content frame). Right-click in the frame.
3	<b>Internet Explorer.</b> On the pop up menu, click <b>Properties</b> . In the Properties dialog box, in the <b>Address (URL)</b> area, highlight the URL, copy it, then paste it into the URL text box on the Extract Metadata screen. <b>Netscape Navigator.</b> On the pop up menu, click <b>View Frame Info</b> . A Page Info window opens. At the top of the Page Info window, a list of links appears. Highlight and copy the first link listed and paste it into the URL text box.

## 7 Import bibliographic or authority records

### Why import records?

- Contribute bibliographic or authority records created in your library's local system.
- Process bibliographic records from OCLC offline services: PromptCat, Bibliographic Record Notification, GovDoc, and WorldCat Collection Sets.
- Process unresolved Batchload records.

### Records you can import

- Bibliographic or authority records:
  - MARC format only (OCLC-MARC or MARC21).
  - Exported from a local system. Export the records to a file via your system's MARC export function.
- Bibliographic records received from OCLC offline services: PromptCat, Bibliographic Record Notification, GovDoc, WorldCat Collection Sets, and Batchload.
- OCLC bibliographic records (records that contain an OCLC control number in the 001 field) from offline products or from your local system.
- **Note: Use imported OCLC bibliographic records.**
  - You can take most actions on imported OCLC bibliographic records, including: Derive New Record, Export, Update Holdings, and Validate.
  - Cannot delete holdings.** Imported OCLC records do not contain the indication that the item is Held or Not Held by your library. You cannot take the Delete Holdings action on imported record. To view holdings for the item, take the Display Holdings action.
  - Caution: Lock and Replace.** If you use an imported OCLC bibliographic record to lock the corresponding master record, Connexion locks and displays the current version of the master record, overwriting any changes you made to the imported record. The system warns you that your changes will be lost and asks whether you want to continue.
- OCLC authority records (records that contain an OCLC Authority Record Number (ARN)) exported from your local system or supplied via the OCLC MARS service.
  - Record actions: Derive only.** To use an imported OCLC authority record, you must first take the Derive New Record action. You cannot take other actions on the imported record. After completing the derived record, you can take any action, including: Export Record, Submit Record for Review, and Add Record.
  - Cannot validate.** Imported OCLC authority records do not pass validation in Connexion browser. Internal dates in imported authority records do not match the system date. You cannot correct this problem by modifying the record. To use the content of the imported record within Connexion, derive a

new record from it; the derived record does not contain the mismatched internal date.

- **Caution: Lock and Replace.** If you use an imported OCLC authority record to lock the corresponding master record, Connexion locks and displays the current version of the master record, overwriting any changes you made to the imported record. The system warns you that your changes will be lost and asks whether you want to continue.
- Non-OCLC bibliographic records.
  - Imported as new records (workforms)
  - On these records, you can take any actions that are available for bibliographic workforms generated within Connexion.
- Non-OCLC authority records
  - Imported as new records (workforms)
  - On these records, you can take any actions that are available for authority workforms generated within Connexion

About import files

Property	Requirements and notes
Format	OCLC-MARC or MARC21 only. <b>Caution:</b> <ul style="list-style-type: none"> <li>• <b>Non-MARC files.</b> If you try to import from a non-MARC file (for example, a file with the extension .doc, .xls, .mdb, .msg, .gif, .jpeg, or .tif), Connexion displays an error message.</li> <li>• <b>File with corrupt or fragmented MARC records</b> If you try to import from a corrupted file of MARC records, or a file that contains some MARC data, the system cannot process the file. If the browser is inactive for more than 5 minutes, click the <b>Stop</b> button. Then check the file for problems before retrying import.</li> </ul>
Record types	Bibliographic records Authority records
Size	No prescribed maximum for file size (KB or MB). Connexion imports records in groups of 100, pausing after each group to ask you to confirm that you want to continue. Maximum number of records you can import depends on the number of records currently in your bibliographic or authority save file. Save files can contain up to 9,999 records.
Location	Disk: Hard disk or network drive connected to local workstation. URL: Public Web server. Connexion must be able to retrieve the file via an HTTP request. <b>Note: No FTP support.</b> Due to security measures, the import function cannot retrieve files via FTP; only the HTTP protocol is supported.

## Create Bibliographic Records

### Prepare to import records

	Action
1	Select and/or set up the location (local drive or URL) for files of records to import.
2	<p>Create or retrieve file of records to import.</p> <ul style="list-style-type: none"> <li>• Export bibliographic or authority records from OCLC software or from your local system</li> <li>Or</li> <li>• Retrieve a file of bibliographic records received from your OCLC cataloging service (PromptCat, Bibliographic Record Notification, GovDoc, WorldCat Collection Sets, or Batchload)</li> </ul>
3	Move the file of records to the local drive or upload to the Web server.
4	<p>(Optional) Decide whether to apply constant data or insert My Status notes in the imported records:</p> <ul style="list-style-type: none"> <li>• Bibliographic records <ul style="list-style-type: none"> <li>— <b>Apply default constant data.</b> Verify that your current default constant data record is appropriate. Edit the default CD record or designate another CD record as your default CD. Change the Fields to Apply setting if desired.</li> <li>— <b>Include My Status note.</b> When importing records from an OCLC service, select the My Status option and specify the appropriate record type. For other records, leave the record type box empty. For any group of imported records, assign a distinctive My Status note to help you manage the records in the bibliographic save file.</li> </ul> </li> <li>• Authority records <ul style="list-style-type: none"> <li>— <b>Apply default constant data.</b> Verify that your current default authority constant data record is appropriate. Edit the default CD record or designate another CD record as your default authority CD. Change the Fields to Apply setting if desired.</li> </ul> </li> </ul>

### Import bibliographic or authority records

	Action
1	Log on to Connexion browser.
2	On the Cataloging tab or the Authorities tab, under Create Options, click <b>Import Records</b> .
3	<p>Specify the records to import.</p> <p>Under <b>Type of Records to Import</b>:</p> <ul style="list-style-type: none"> <li>• Select <b>Import Bibliographic Records</b> to import bibliographic records only.</li> <li>Or</li> <li>• Select <b>Import Authority Records</b> to import authority records only.</li> <li>Or</li> <li>• Select <b>both</b> check boxes if the file contains both bibliographic and authority records and you want to import both record types at once.</li> </ul>

	<b>Action</b>
4	<p>Specify the file location. Under <b>File Location</b>:</p> <ul style="list-style-type: none"> <li>• In the <b>Disk</b> text box, type the full path (drive letter, folder, and file name) for an import file on a local hard disk or network drive. Or click the <b>Browse</b> button to navigate to the location.</li> <li>Or</li> <li>• In the <b>URL</b> text box, type the URL for an import file located on a Web server. <b>Note:</b> You must specify the URL using the HTTP protocol, beginning with <b>http://</b></li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Below each text box, the screen shows the location from which you last imported records.</li> <li>• Specify <b>either</b> a disk location or a URL. If you click <b>Import</b> with text in both boxes, an error message appears.</li> </ul>
5	<p>(Optional) Apply default constant data Under Import Bibliographic Records or Import Authority Records:</p> <ul style="list-style-type: none"> <li>• Select the <b>Apply Default Constant Data</b> check box to apply your default constant data record to imported bibliographic records and/or authority records.</li> <li>Or</li> <li>• Clear the check box to import records without applying constant data.</li> </ul>
6	<p>(Optional) Assign My Status to bibliographic records Under My Status for Bibliographic Records:</p> <ul style="list-style-type: none"> <li>• <b>Type.</b> For records from OCLC offline services, select the service that supplied the records you plan to import. For other records, leave the Type box empty.</li> <li>• <b>Identifier box.</b> For any bibliographic record, type a distinctive note to help you retrieve and manage imported records in the bibliographic save file.</li> </ul>
7	<p>Click <b>Import</b>.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Connexion imports the specified records, beginning with the first record in the file.</li> <li>• The system adds the records to the bibliographic save file and/or the authority save file with the source status <b>Imported</b>.</li> <li>• Non-OCLC records are imported as OCLC workforms.</li> <li>• Based on the options you select, the system applies default constant data and/or inserts My Status notes (bibliographic records only).</li> <li>• After importing all specified records, Connexion displays a results screen that gives totals for bibliographic and/or authority records and reports actions taken on the records.</li> </ul> <p><b>More than 100 records in file</b> If the import file contains more than 100 records:</p> <ol style="list-style-type: none"> <li>1. Connexion imports the first 100 records.</li> <li>2. The system displays a status screen and asks you to confirm that you want to continue importing records. Click <b>OK</b> or press &lt;Enter&gt; to continue importing with the next record in the file.</li> <li>3. After importing each group of 100 records, the system again pauses and asks you to click <b>OK</b> or press &lt;Enter&gt; to continue.</li> </ol>

## Create Bibliographic Records

### Imported records: details

- All imported records are assigned the source status **Imported**.
- MARC21 records are converted to OCLC-MARC.
- Non-OCLC records are converted to workforms.
- The following table gives details on changes Connexion makes automatically during the import process.

Record type	OCLC record	Non-OCLC record
Bibliographic	<ul style="list-style-type: none"> <li>• Workflow status: In process</li> <li>• Save file expiration date: 14 days.</li> <li>• OCLC control number retained in 001.</li> <li>• If Lang in fixed field is 3 blanks, change to zxx (No linguistic content).</li> <li>• If record contains 533 \$7, convert the data to a 539 field.</li> <li>• Delete field 994 if present.</li> </ul>	<ul style="list-style-type: none"> <li>• Workflow status: New</li> <li>• Save file expiration date: 28 days.</li> <li>• NEW in 001.</li> <li>• Entered date replaced with current date.</li> <li>• RecStat value set to n.</li> <li>• Default 040 field inserted.</li> <li>• If Lang in fixed field is 3 blanks, change to zxx (No linguistic content).</li> <li>• If record contains 533 \$7, convert the data to a 539 field.</li> </ul>
Authority	<ul style="list-style-type: none"> <li>• Workflow status: In process</li> <li>• Save file expiration date: 90 days.</li> <li>• ARN retained in 001.</li> </ul>	<ul style="list-style-type: none"> <li>• Workflow status: New</li> <li>• Save file expiration date: 90 days.</li> <li>• NEW in 001.</li> <li>• Entered data replaced with current data.</li> <li>• RecStat value set to n.</li> <li>• EncLvl value set to n.</li> <li>• Default 040 field inserted.</li> <li>• Fields deleted: 002, 003, 004, 005, 009, 010, and 035.</li> </ul>

**Find imported bibliographic records**

Action
<p><b>Show by Status screen</b> On the Cataloging tab, under Show Options, click <b>By Status</b>.</p> <ol style="list-style-type: none"> <li>At the status list screen, under Show Save File, Source Status, select the check box for the <b>Imported</b> status.</li> <li>Then click <b>Show Records</b> or press &lt;Enter&gt;.</li> </ol> <p>Or</p> <p><b>Search Save File screen</b> On the Cataloging tab, under Search Options, click <b>Save File</b>.</p> <ul style="list-style-type: none"> <li><b>Search for Imported status.</b> On the Search Save File screen, at the bottom of the search form, open the <b>Source Status</b> list and click <b>Imported</b>.</li> <li><b>Search for My Status text.</b> In the Search for box, type the text you supplied on the Import Records screen. You can search for any whole word in the note. Search for the Type only (if specified), for any word in the free-text Identifier, or for the complete My Status note (Type plus user-defined note).</li> </ul> <p><b>Example</b> If you selected PromptCat from the Type list and also supplied the date <b>20031031</b> in the Identifier box, you can retrieve the records by searching for <b>PromptCat</b> only, for <b>20031031</b> only or for the complete note <b>PromptCat 20031031</b>.</p> <ul style="list-style-type: none"> <li>Then click <b>Search</b> or press &lt;Enter&gt;.</li> </ul>

**Find imported authority records**

Action
<p><b>Show by Status screen</b> On the Authorities tab, under Show Options, click <b>By Status</b>.</p> <ol style="list-style-type: none"> <li>At the status list screen, under Show Save File, select the check box for the <b>Imported</b> status.</li> <li>Then click <b>Show Records</b> or press &lt;Enter&gt;.</li> </ol> <p>Or</p> <p><b>Search Authorities Save File screen</b> On the Authorities tab, under Search Options, click <b>Save File</b>.</p> <ul style="list-style-type: none"> <li>On the Search Save File screen, at the bottom of the search form, open the <b>with Status</b> list and click <b>Imported</b>.</li> <li>Then click <b>Search</b> or press &lt;Enter&gt;.</li> </ul>

**Download OCLC records**

Use this procedure to download records from the Product Services Web.

	Action
1	Point your Web browser to Product Services Web at <a href="http://psw.oclc.org/">http://psw.oclc.org/</a> and press <Enter>.
2	Click <b>Records and Reports</b> .
3	Click the service that supplies the records you want.
4	Enter an authorization number and password and click <b>OK</b> .
5	Right click the <b>Download</b> link next to the record file. Click <b>Save Target As</b> .
6	To download the file, click <b>Save</b> .

For more information, see the *Product Services Web Quick Reference* at: <http://www.oclc.org/support/documentation/batchprocessing/using/productservices/>

### Unresolved Batchload Records

Unresolved records are bibliographic records for which no match was found in WorldCat by the OCLC Batchload service. These records fail to match for a variety of reasons, including legitimate differences in cataloging practice, data errors, or other problems. OCLC posts files of unresolved batchload records on the Product Services Web.

Unresolved records have the following characteristics:

- They have the word NEW instead of an OCLC Control Number.
- The file of records remains on the Product Services Web for 90 days before being deleted automatically.
- If the unresolved records are generated by group batchload projects, they have identifiers in the 951 field.

### Process unresolved batchload records

	Action
1	Perform this procedure after you have downloaded your unresolved batchload records from OCLC Product Services Web, imported them into your Connexion interface (browser or client), and retrieved them. See earlier sections of this topic for these procedures.
2	Search WorldCat for the item to see if a record exists.
3	<p><b>If a record exists (individual institution project):</b> Follow local practice to determine if you should use the record you found instead of the one from your project. If you use the record you found, edit it as needed.</p> <p><b>If a record exists (group project):</b> Copy the library identifier from the 951 field in the unresolved record and paste it into the WorldCat record you found.</p> <p><b>If no record exists:</b> Edit the unresolved record, as needed.</p>
4	Take final action on the record (produce, update, save, export).
5	Delete the unresolved record from the save file, if needed.

## 8 Use extraction shortcuts

### What are extraction shortcuts?

- Links you can place on the personal toolbar in your Web browser.
- When you click the link, the browser runs a script that logs on to Connexion and then extracts information from the Web page displayed in the browser to generate Dublin Core metadata or create a basic bibliographic record.

### Extraction shortcuts available

Extraction shortcut	What it does
DC Metadata	Generates metadata for a Web page currently loaded in the browser. Produces Dublin Core metadata in an XML document that complies with the Resource Description Format (RDF) standard.
MARC Edit	Creates a new bibliographic record in MARC format for a Web page currently loaded in the browser. Presents the new record for editing in a MARC template. Record creation may include assignment of Dewey numbers. If you are not logged on to Connexion, starts a new session.
DC Edit	Creates a new bibliographic record in Dublin Core format for a Web page currently loaded in the browser. Presents the new record for editing in a Dublin Core template. Record creation may include assignment of Dewey numbers. If you are not logged on to Connexion, starts a new session.

### Why use an extraction shortcut?

- Start creating a record for a useful resource at any time. You need not log in to Connexion to create a record.
- Conveniently capture a description of a resource you discover and add the record to your workflow for future completion.
- Save time when creating metadata for new or updated web pages.
- Generate metadata to insert in a Web page without logging on to Connexion or creating a record for the resource.

### Add extraction shortcuts to browser toolbar

**Note: Shortcut includes system URL and authorization.**

- Add extraction shortcuts to your browser while logged on to Connexion with an authorization that permits record creation (**not** Search). The script for an extraction shortcut includes the authorization number/password and the URL from the session in which you add the shortcut link.
- To **change** the authorization associated with an extraction shortcut, remove the link from the browser toolbar, log in again using the desired authorization, and then add the link to the toolbar.

	Action
1	<p>Show your browser's personal toolbar if it is not visible.</p> <p><b>Internet Explorer.</b> On the View menu click <b>Toolbars</b> and then click <b>Links</b>. A Links item appears at the right end of the Address Bar, with a &gt;&gt; button for displaying a list of links previously added.</p> <p><b>Netscape Navigator.</b> On the View menu click <b>Show</b> and then click <b>Personal Toolbar</b>. A toolbar appears below the Location toolbar. The toolbar shows any buttons previously added.</p>
2	<p>Log in to Connexion.</p> <p>On the General tab, under Admin Options, click <b>Extraction Shortcuts</b>. The Extraction Shortcuts screen appears. For each shortcut, the screen shows a textual link and a graphic of a mouse.</p>
3	<p>Add an extraction shortcut to the browser's personal toolbar.</p> <p>Click the <b>textual link</b> (not the graphic) for the shortcut you want and drag the link from the Extraction Shortcuts screen to the personal toolbar. Then release the mouse button.</p> <p>If the browser asks you to confirm that you want to add the link, click <b>Yes</b>.</p>
4	<p>Repeat step 3 to add the other shortcuts.</p>

**Remove extraction shortcut from browser toolbar**

Action
<p><b>Internet Explorer.</b> At the right end of the Address Bar, click the <b>Links</b> button (marked &gt;&gt;) to open the list of links. Right-click the shortcut you want to delete: MARC Edit or DC Edit or DC Metadata. On the popup menu, click <b>Delete</b>.</p> <p><b>Netscape Navigator.</b> On the Communicator menu highlight Bookmarks and click <b>Edit Bookmarks</b>. In the Bookmarks window, under <b>Personal Toolbar Folder</b> is a list of the items on the Personal Toolbar. Right-click the shortcut you want to delete: MARC Edit or DC Edit or DC Metadata. On the popup menu click <b>Delete Bookmark</b>.</p>

**Use MARC Edit or DC Edit shortcut**

	Action
1	<p>Go to the site for which you want to create a bibliographic record.</p>
2	<p>On the browser's personal toolbar, click the link for MARC Edit or DC Edit.</p> <p><b>Internet Explorer.</b> At the right end of the Address Bar, click the <b>Links</b> button (marked &gt;&gt;) to open the list of links. Click <b>MARC Edit</b> or <b>DC Edit</b>.</p> <p><b>Netscape Navigator.</b> On the Personal Toolbar (under the Location toolbar) click the button for <b>MARC Edit</b> or <b>DC Edit</b>.</p>

	Action
3	<p>At the login screen, enter the authorization and password you use to log on to Connexion and click <b>Logon</b>.</p> <p>When you click <b>Logon</b>, the shortcut opens a session and automatically searches WorldCat for the URL of the site.</p> <p>If no record(s) exist for the resource, the system creates a new record in the appropriate format (MARC or DC) and displays it in an edit view.</p> <p><b>Existing records.</b> Any existing record(s) for the resource are retrieved; you can view the record(s) or continue with creating a new record.</p>
4	<p>Edit the new record as necessary and add it to WorldCat.</p> <p>Or</p> <p>Save the record and 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. When you save the record, the system assigns the source status <b>Extracted</b>. After saving the record, you can exit the system.</p> <p>In a later session, you can retrieve the new record from the bibliographic save file and complete processing.</p> <p><b>Prevent duplicate records</b></p> <p>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.</p>

Use DC Metadata shortcut

	Action
1	<p>Go to the site for which you want to create Dublin Core metadata.</p>
2	<p>On the browser's personal toolbar, click the link for DC Metadata.</p> <p><b>Internet Explorer.</b> At the right end of the Address Bar, click the <b>Links</b> button (marked &gt;&gt;) to open the list of links.</p> <p>Click <b>DC Metadata</b>.</p> <p><b>Netscape Navigator.</b> On the Personal Toolbar (under the Location toolbar) click the button for <b>DC Metadata</b>.</p>
3	<p>At the login screen, enter the authorization and password you use to log on to Connexion and click <b>Logon</b>.</p> <p>When you click <b>Logon</b>, the shortcut opens a session and automatically extracts information from the site to generate Dublin Core metadata.</p> <p>The metadata is displayed in a new browser window as an RDF-compliant XML document.</p>
4	<p>To embed the metadata in the Web page, copy the displayed text directly or save it to a file and then copy it.</p> <p>Open the Web page in a text editor.</p> <p>Paste the copied metadata within the &lt;head&gt; section of the page.</p>