

Edit Bibliographic Records

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Revision History

| Date | Section title | Description of changes |
|---------------|---|--|
| May 2006 | 1. Edit record: basics | Minor updates. |
| | 5. Insert diacritics and special characters | Revised to update list of bar syntax character codes to reflect changes in character names and to add newly supported characters. |
| November 2006 | 1. Edit record: basics | Minor updates. |
| | 2. Editing techniques, template view | Added information on guided editing for fields 541 and 583, commonly used when cataloging archival materials. |
| December 2006 | 1. Edit record: basics | Updated to add information about display of WorldCat records that contain non-Latin scripts.. |
| May 2007 | 4. Validate record | Revised to document change in default validation level from None to Structure. |
| February 2012 | 2 Editing techniques, template view | Series added entry fields 800, 810, 811, 830 can now be used to insert data from a "cited" record for a related series item. Removed "and DDC" from Control All commands. DDC numbers are no longer controlled in Connexion. |
| April 2012 | 2. Editing techniques, template view | New section on how to use the prototype OCLC Classify service. |

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1 Edit bibliographic records: basics

Editing capabilities

Specific editing capabilities and actions you can take on bibliographic and authority records depend on your OCLC cataloging authorization level.

OCLC assigns each institution one or more authorization number and password combinations. The authorization/password has an associated default cataloging level, which tells Connexion when you log on what actions you are authorized to take.

The following table lists authorized actions by type of authorization level:

| Authorization level (cataloging mode) | Authorized actions |
|--|---|
| Search (sch) | <ul style="list-style-type: none"> • Search any OCLC database and retrieve MARC records, including WorldCat, LC names and subjects authority file, LC names and subjects history file, and the Chinese name authority file • Export records • Display holdings |
| Limited (ltd) | <p>Same actions as for Search and the following actions:</p> <ul style="list-style-type: none"> • Create records • Save records • Validate records • Export records • Edit records locally • Lock, edit, and save master records • Submit records for peer review <p>Note: A limited or higher authorization also allows the follow actions for subject authority records:</p> <ul style="list-style-type: none"> • Edit records locally • Validate records • Save records • Export records • Submit records for peer review • Add records to the online authority constant data file • Use records as default constant data <p>Note: No cataloging authorization allows you to create and add or replace subject authority records</p> |
| Full (ful) | <p>Same actions as for Search and Limited and the following actions:</p> <ul style="list-style-type: none"> • Edit records • Set and delete holdings • Lock and replace master bibliographic records in WorldCat • Add new bibliographic records to WorldCat |
| NACO (Name Authority Cooperative program) (nar or nan) | <p>Same actions as for Full and the following actions:</p> <ul style="list-style-type: none"> • Lock and replace name authority records in the LC authority file • Add new name authority records to the LC authority file |

Edit Bibliographic Records

| Authorization level (cataloging mode) | Authorized actions |
|---|--|
| Agent (agnt) | Same actions as for Full and the following action: <ul style="list-style-type: none"> • Set and delete holdings on behalf of other libraries for whom the agent is providing cataloging |
| Retrocon (rcn) | Same actions as for Full Used by members doing retrospective conversion projects |
| Regular Enhance (enh) | Same actions as for Full Used by Enhance participants to enhance non-national, non-PCC (Program for Cooperative Cataloging) master records in authorized formats except for serials |
| Enhance National (enn) | Same actions as for NACO Used by Enhance participants to enhance national and PCC master records in authorized formats except for serials |
| Regular CONSER (Cooperative Online Serials program) (cor) | Same actions as for Full Used by CONSER participants to authenticate and maintain master serial records |
| CONSER National (con) | Same actions as for NACO Used by CONSER participants to authenticate and maintain master serial records |

See more about the Program for Cooperative Cataloging (PCC), including NACO and CONSER, on the Library of Congress Web site at < <http://www.loc.gov/catdir/pcc/> >.

Edit modes defined (master versus local edits)

| Edit mode | Definition and notes |
|---|--|
| Master record bibliographic or name authority record (locked or unlocked) | <ul style="list-style-type: none"> • A master record is the version of the record available to all who have access to Connexion. It does not include local data for any library. • To edit a master record, it must be locked in WorldCat or the LC authority file: <ul style="list-style-type: none"> — Lock a record (Action > Lock Master Record) before you edit it. Or Let the system lock it automatically when you take a Replace Record or Replace and Update action on an unlocked record (must have NACO authorization to replace authority records). — If another user already has locked the record or replaced it after you opened or saved it, the action fails and you get an error message. • When you lock a record, no other user can access the master until you unlock or take an action on it. • Other users can retrieve the record or edit it locally while you have the master record locked. |
| Locally edited bibliographic or authority record | <ul style="list-style-type: none"> • A locally edited record is a copy of the master record that you can modify without affecting the master record. • Any time you edit a record without first locking it, you are making local edits. The record is not locked in WorldCat or the LC authority file. Therefore, other users can retrieve it, edit it locally, or lock and edit the corresponding master record. • You can edit a record locally regardless of whether another user has locked the master record. • While editing a record locally, you can add, delete or change the record content to meet your library's needs and then export the record. • You are using local editing when you do copy cataloging. |

Edit Bibliographic Records

Edit master record or edit record locally

| Edit mode | Definition |
|-----------------------|---|
| Master record | A master record is the version of the record available to all users; it does not include local data for any library. When you begin editing a master record, the record is locked in WorldCat. Other users can retrieve the record in display mode or edit it locally while you have the master record locked for editing. |
| Locally edited record | A locally edited record is a copy of the master record that you can modify without affecting the master record. Use local editing mode for copy cataloging. While editing a record locally, you can add, delete, or change the record content to meet your library's needs and then export the record. The record is not locked in WorldCat; other users can retrieve it in display mode, edit it locally, or lock and edit the corresponding master record. You can edit a record locally regardless of whether another user has locked the master record. |

Edit modes for types of records

The following table shows which records can be modified depending on editing mode:

| Edit modes | Authorization level/ authorized actions | Records/Modifications |
|------------------------|---|---|
| Master records | Limited: Lock, edit, and save master record Full, NACO, or higher: Lock, edit, save, and replace master record | Records your library contributed. Minimal-level records you are upgrading. Records you are enriching (adding call numbers, contents notes, subject headings, non-Latin script data, etc.; adding an 856 field to a record or correcting an error in an 856 field). Note: Capabilities and restrictions vary with authorization level, record format, etc. |
| Locally edited records | Limited or higher: Edit, save, and export record Full or higher: Add or delete holdings | Any record in WorldCat or the LC authority file. Any modifications for local use. |

For details on replacing master records, see:

- Cataloging, Take Actions on Bibliographic Records, “Replace master bibliographic record” or Authorities, Take Actions on Name Authority Records, “Replace authority records”

- *OCLC Bibliographic Formats and Standards*, chapter 5 (Quality Assurance) at <http://www.oclc.org/bibformats/en/quality/>.
- Non-Latin script records in the Connexion browser**
- **WorldCat records.** 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.
 - **Online save file records.** If you save a record containing non-Latin scripts to the online bibliographic save file using the Connexion client and then open the record in the Connexion browser:
 - The record opens in display mode only with a warning at the top: *This record contains non-Latin script data and cannot be edited using this interface.* You cannot edit or take final actions on the record.
 - All non-Latin script data is displayed in 880 fields at the end of the record.
 - You can view the record, print it, or copy and paste data from it.
 - You cannot flag records containing non-Latin scripts.
- Switch edit modes**
- **From editing master record to editing record locally.** Open the Action list and click **Release Record Lock**. The lock on the record is released, but no changes are made to the record content. You can save or export the record with changes made so far.
 - **From editing a record locally to editing the master record.** Open the Action list and click **Lock Master Record**. The system locks the record. If the record is already locked by another user, the system displays a message to inform you and takes no action. When the record is locked, all edits made in local edit mode are lost. To preserve edits made in local edit mode for use in modifying the master record, switch to a text area edit view, select the text you want, and copy it to the clipboard (on the browser's edit menu, click **Copy**; or press <Ctrl><C>). Then take the **Lock Master Record** action. In the locked master record, paste the copied data (on the browser's edit menu, click **Paste**; or press <Ctrl><V>).
- Caution: Store edits on server before moving to another screen**
- If you edit **fields** in a bibliographic record without interacting with the server, and then move to another screen (for example, to search WorldCat or the Authority File, or view flagged records), you **lose all changes** made since the last server interaction. When you resume editing, the system redisplay the working copy of the record **as it exists on the server**, not necessarily as it last appeared on your screen.
 - Changes to the text of record fields are **not sent to the server** until you use the Action list (to reformat, validate, save, etc.), the View list (to switch to another edit view or display view), or the Functions list (for field-level actions). These actions send a request to the server, along with the displayed record content. The server responds by taking the requested action and then redisplaying the updated record.
 - As a precaution when editing, **occasionally reformat** the record to make sure that your changes are stored on the server.

- **Note: Inactivity timeout.** As an added benefit, occasional interaction with the server prevents the **inactivity timer** from ending your session. Only server interactions count as session activity.

Master record locked for editing

- When you begin editing a **master** record, it is locked.
- Other users can view the record but cannot change it until you release the lock.
- To **unlock** the record, take the **Release Record Lock** action or the **Cancel Changes** action, or **replace** the master record (**Replace Record** or **Replace and Update Holdings**).
- To place a long-term lock (14 days) on the record, **save** it while it is locked.

Logoff warning for edited records

- When you click **Logoff** to end a session, the system checks for records in edit mode, including locked master records and new records not saved or added to WorldCat.
- The system displays a message to remind you to save the records or complete editing and take a final action before logging off.
- To complete your work on the record(s), on the message screen click **Show Active Records** or press <Ctrl><Shift><9>. Or, on the Cataloging tab, under Show Options, click **Active Records** or press <Alt><4>. At the Active Records screen, under Bibliographic Records or Bibliographic Save File, click the link for the record you were editing. For each active record, the link shows the title and either an OCLC control number or a save file number. If the record contains no title, **No Title Provided** appears in the link. For a new record (not yet saved or added to WorldCat), the link shows only the title or **No Title Provided**.
- To log off and discard unsaved changes to the record(s), on the message screen click **Logoff immediately**.
- **Turn off logoff warning for active records**

If you prefer **not** to be notified about active records before logging off, use the **Show or Hide Logoff Warning** option to prevent the system from displaying this warning. To view or change the setting, do one of the following:

—From the End Your Session screen (the logoff warning), go directly to the Interface Customization Options screen by clicking **Customize your setting**.

Or

—On the General tab, click **Admin**. On the Preferences screen, click **General Options**. Then click **Interface Customization Options**. On the Interface Customization Options screen, find the **Show or Hide Logoff Warning** option and select **Hide**.

Use the Active Records screen

| Action | How to |
|-----------------------------|--|
| Go to Active Records screen | Press <Ctrl><Shift><9>. Or On the Cataloging tab, under Show Options, click Active Records or press <Alt><4>. |

| Action | How to |
|---|---|
| Resume editing a bibliographic record | Under Bibliographic Records, click the OCLC control number. The link for each active record includes the title or (if the record contains no title) No Title Provided . For a new record (not yet saved or added to WorldCat), the link shows only the title or No Title Provided . |
| Resume editing a saved bibliographic record | Under Bibliographic Save File, click the save file number. The link for each active record includes the title or (if the record contains no title) No Title Provided . |
| Resume editing constant data record | Under Bibliographic Constant Data, click the constant data name. Or click New (if editing a newly created constant data record.). |

Derived record not on Active Records screen

- When you derive a new bibliographic record, the **base** record (the record you derived from) is no longer listed on the Active Records screen.
- The link for the new record contains the title only (not an OCLC control number or save file number).

Bibliographic record edit views (edit modes)

The table describes record appearance for records in edit modes (locked master records of records in local edit mode), for MARC and Dublin Core formats.

| View | Description |
|----------------|---|
| MARC Template | Template view for editing in Machine-Readable Cataloging (MARC) format. Compliant with MARC 21. MARC 21 fields may be supplemented with additional fields defined in OCLC-MARC. Content for each field is viewed and edited in a row of text boxes. Provides Functions list for adding/removing fields. Authority control functions available (control individual fields or all controllable fields). Input guidelines available for variable fields via Help on Functions list. Templates simplify entering fixed field (008) and 006 field(s). Help buttons provide input guidelines for 008 and 006. Elements in fixed-length fields linked to specific guidelines. |
| MARC Text Area | Text area view for editing MARC-format record; all variable fields are viewed and edited in a single large text box. Lets experienced MARC users edit efficiently by reducing interactions with the server. Authority control functions not available. Record appearance in display mode same as MARC Template view. Templates simplify entering fixed field (008) and 006 field(s); Help buttons provide input guidelines for 008 and 006, but not for other fields. Elements in fixed-length fields linked to specific guidelines. |

| View | Description |
|--------------|--|
| DC Template | <p>Template view for editing in Dublin Core format. Provides drop-down lists for selecting DC element labels plus optional qualifiers and schemes (specific sets of qualifiers and schemes appropriate for each element). Uses full qualifier labels and standard syntax for adding qualifiers and schemes.</p> <p>Content for each field is viewed and edited in a row of text boxes. Provides Functions list for adding/removing fields. Authority control functions available (control individual fields or all controllable fields). Input guidelines available for DC elements via Help on Functions list.</p> |
| DC Text Area | <p>Text area view for editing Dublin Core format records. All fields are viewed and edited in a single large text box. Lets DC users edit efficiently by reducing interactions with the server. Record appearance in display mode same as DC Template view.</p> <p>Add Element function simplifies entry of labels, qualifiers, and required punctuation and spacing. Authority control functions not available.</p> <p>Direct access to input guidelines for DC elements not available.</p> |

Bibliographic record display views (display mode)

The table describes record appearance for records in display mode, for MARC and Dublin Core formats.

| View | Description |
|---------------------------------|--|
| MARC Template or MARC Text Area | <p>View for displaying records in Machine-Readable Cataloging (MARC) format. Compliant with MARC 21. MARC 21 fields may be supplemented with additional fields defined in OCLC-MARC. Input guidelines available for variable fields via hyperlinked field tags. Help buttons provide input guidelines for 008 and 006. Elements in fixed-length fields linked to specific guidelines.</p> <p>MARC display view is the same whether you select MARC or MARC Text Area from the View list.</p> |
| DC Template or DC Text Area | <p>View for displaying records in Dublin Core format. Uses full qualifier labels and standard syntax for adding qualifiers and schemes.</p> <p>Dublin Core display view is the same whether you select DC Template or DC Text Area from the View list.</p> |
| DC HTML Preview | <p>Dublin Core metadata elements presented in HTML. For display/export only; you cannot edit records or take any actions (except export) while using this view.</p> <p>DC HTML Preview available (on View list) while displaying or editing record in any view. Export Record in DC HTML available only when displaying or editing record in DC Template or DC Text Area view.</p> |

| View | Description |
|----------------|--|
| DC RDF Preview | Dublin Core metadata elements presented in Resource Description Framework (RDF). For display/export only ; you cannot edit records or take any actions (except export) while using this view. DC RDF Preview available (on View list) while displaying or editing record in any view. Export Record in DC RDF available only when displaying or editing record in DC Template or DC Text Area view. Note: RDF is a structure represented in Extensible Markup Language (XML). |

Set bibliographic record views

| | Action |
|---|--|
| 1 | On the General tab, under Admin Options, click Preferences . |
| 2 | At the Preferences screen, click Cataloging Options . |
| 3 | On the Cataloging Options screen, locate the Bibliographic Record View settings. |
| 4 | Under Bibliographic Record View, Bibliographic Save File Record View, and Bibliographic Constant Data Record View, <ul style="list-style-type: none"> Click an option button to select MARC Template or MARC Text Area or DC Template or DC Text Area. Default setting: MARC Template (for all views) |
| 5 | Save changes as default or use for current session only. <ul style="list-style-type: none"> Click My Default or For This Session. Change view while editing or creating a bibliographic record <ul style="list-style-type: none"> While editing a bibliographic record or constant data record, you can switch views at any time using the View list (top right corner of screen). Before creating a new bibliographic record or constant data record, you can select the editing view at the Create Record screen or the Create Constant Data screen. |

Edit Bibliographic Records

Set mode for single records from search results

- This option specifies your preferred mode for viewing a single record retrieved from the following databases:
 - WorldCat
 - Bibliographic save file
- The setting applies when you retrieve a single record and when you select a record to view from a results list.

| | Action |
|---|---|
| 1 | On the General tab, under Admin Options, click Preferences . |
| 2 | At the Preferences screen, click Cataloging Options . |
| 3 | On the Cataloging Options screen, locate the Mode for Single Record from Search Results setting. |
| 4 | <ul style="list-style-type: none"> • Click an option button to select Display Mode or Edit Mode or Master Edit Mode. Default setting: Edit Mode. |
| 5 | Save changes as default or use for current session only. <ul style="list-style-type: none"> • Click Save My Default or Save For Session. |

Specify placement of fixed field and record status area

| | Action |
|---|---|
| 1 | On the General tab, under Admin Options, click Preferences . |
| 2 | At the Preferences screen, click Cataloging Options . |
| 3 | On the Cataloging Options screen, locate the Placement of Record Areas setting. |
| 4 | Fixed Field Place the fixed field at the top or bottom of the bibliographic record. Click to select one of the option buttons: <ul style="list-style-type: none"> • Top Or • Bottom Default setting: Top. |
| 5 | Record Status and URL Notification View the record statuses at the top or bottom of the bibliographic record. Click to select one of the option buttons: <ul style="list-style-type: none"> • Top Or • Bottom Default setting: Bottom. |
| 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. |

2 Editing techniques: template views

Keystroke shortcuts for editing

| To do this | Press |
|--|--|
| Move cursor between the first fixed-field element and the first variable fields. Note: In save file records, moves cursor to fixed field, variable fields, and the workflow status area. | <Alt></> (slash) |
| Move to the top or bottom of the record screen. | <Ctrl><Home> to move to the first input box on the screen. <Ctrl><End> to move to the last input box on the screen. |
| Show or hide the Functions list | <Alt><Y> |
| Go to the Active Records screen | <Ctrl><Shift><9> |

Edit in template view

| Procedure | MARC Template | DC Template (Dublin Core) |
|--------------------------------|---|---------------------------|
| Change text | In the text box for the field, use standard editing keys (<Insert>, <Backspace>, <Delete>, arrow keys) to move the insertion point and remove or add characters. | |
| Delete text | In the Functions list click Delete Text . The system removes the text of the field; tag and indicators remain. Empty fields removed The empty field is removed if you reformat the record or take a final action. | |
| Undo text changes <Ctrl><Z> | To reverse the most recent text change, use the standard Windows undo keystroke: <Ctrl><Z>. The following functions are supported in recent browser versions. Specific functionality may change with browser upgrades. Check browser Help or documentation for details. Undo last change, current text box: Press <Ctrl><Z> once. Undo series of changes, current text box: Press <Ctrl><Z> once to reverse each change, beginning with the last. Undo series of changes in different text boxes: Place the insertion point in the desired text box and then press <Ctrl><Z>. Begin with the text box most recently modified and return to the other text boxes in reverse order (retrace your steps). Notes on browser-based Undo Browser dependent. Support for <Ctrl><Z> varies with browser and version. Refresh clears undo memory. If you take an action that refreshes the screen (for example, select an item on the navigation bar, the Action list, or the Functions list for a field), the undo memory is cleared. | |

| Procedure | MARC Template | DC Template (Dublin Core) |
|--|---|---------------------------|
| Enter diacritics and special characters Character chart window Internet Explorer for Windows only | <ol style="list-style-type: none"> 1. Place the cursor where you want to insert a diacritic or special character. 2. Press <F7>. 3. In the Enter Diacritics and Special Characters window, click a character or diacritic to insert it at the cursor position. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. <p>Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol.</p> <p>(Note: Windows only. Not supported by Macintosh versions of IE.)</p> | |
| Enter diacritics and special characters Bar syntax (mnemonic codes) | <p>Enter diacritics and special characters using mnemonic codes.</p> <p>Diacritics.</p> <ol style="list-style-type: none"> 1. Type the code for a diacritic after the letter it modifies (Unicode syntax). 2. First type the letter modified by the diacritic. 3. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 4. Type the mnemonic for the diacritic. 5. Then type another vertical bar symbol. <p>Do not type a space between the letter and the code for the diacritic.</p> <p>Example: To enter an e with an acute accent, type e ac </p> <p>Special characters.</p> <ol style="list-style-type: none"> 1. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 2. Type the mnemonic for the special character. 3. Then type another vertical bar symbol. <p>Code list</p> <p>Note: appearance in edit mode</p> <ul style="list-style-type: none"> • Characters entered using this method are automatically replaced with typographic forms. • If you prefer, you can set an option to view the bar syntax in edit mode. | |
| Table of ALA-defined diacritics and special characters | <ul style="list-style-type: none"> • On the header bar (black bar at the top of every system screen), click Diacritics. <p>Use the table to identify a character, find a character by name, or copy a character for input in a record.</p> <p>For other ways to enter diacritics and special characters, as well as additional information, see Insert diacritics and special characters.</p> | |

| Procedure | MARC Template | DC Template (Dublin Core) |
|--|---|--|
| Add single field or element | <p>Move to the field above the place where you want to add a field.</p> <p>In the Functions list click Add Single Field Below.</p> <p>The inserted field duplicates the MARC tag of the preceding field.</p> <p>In the added field, change the tag and supply indicators as appropriate.</p> | <p>Move to the element above the place where you want to add an element.</p> <p>In the Functions list click Add Single Field Below.</p> <p>The inserted element duplicates the DC element label of the preceding element.</p> <p>In the added element, change the DC element label and specify a qualifier and/or scheme as appropriate.</p> |
| Add multiple fields or elements | <p>Move to the field above the place where you want to add fields.</p> <p>In the Functions list click Add Multiple Fields.</p> <p>In the dialog box, type the number of fields you want to add (1 through 10). Then click OK.</p> <p>The inserted fields duplicate the MARC tag of the preceding field.</p> <p>In the added fields, change the tags and supply indicators as appropriate.</p> | <p>Move to the element above the place where you want to add elements.</p> <p>In the Functions list click Add Multiple Fields.</p> <p>In the dialog box, type the number of elements you want to add (1 through 10). Then click OK.</p> <p>The inserted elements duplicate the DC element label of the preceding element.</p> <p>In the added elements, change the DC element labels and specify qualifiers and/or schemes as appropriate.</p> |
| Delete field or element | In the Functions list click Delete Field . | |
| Copy field or element | <p>Move to the field or element you want to copy.</p> <p>In the Functions list click Copy Field.</p> <p>Move to the field/element above the place where you want to insert the copied field/element.</p> <p>In the Functions list click Paste Field.</p> | |
| Move field or element (Cut and Paste) | <p>Scroll to the field or element you want to reposition.</p> <p>In the Functions list click Cut Field.</p> <p>Scroll to the field/element above the place where you want to insert the moved field/element.</p> <p>In the Functions list click Paste Field.</p> | |
| Add authority control for field or element | In the Functions list click Control Heading . | MARC only Not available in Dublin Core template view. |
| Edit (uncontrol) a controlled field or element | In the Functions list click Uncontrol Heading . | MARC only Not available in Dublin Core template view. |

| Procedure | MARC Template | DC Template (Dublin Core) |
|---|--|--|
| Edit Master Authority Record for name heading Controlled name heading fields only | Move to the name heading field for which you want to edit the linked master authority record. In the Functions list click Lock Master Authority Record . 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). | MARC only Not available in Dublin Core template view. |
| Edit Authority Record for name heading Controlled name heading fields only | Move to the name heading field for which you want to locally edit the linked authority record. In the Functions list click Edit Authority . 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). | MARC only Not available in Dublin Core template view. |

| Procedure | MARC Template | DC Template (Dublin Core) |
|---|--|---|
| <p>Derive New Authority Record from record for name heading Controlled name heading fields only</p> | <p>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 Connexion Authority File. • Transfers selected content and/or supplies default fields/values to produce a new record based on the linked authority record. • Presents the resulting record in local edit mode. • Inserts NEW 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>MARC only Not available in Dublin Core template view.</p> |

| Procedure | MARC Template | DC Template (Dublin Core) |
|--|---|---|
| <p>Generate Authority Record for name heading</p> <p>Uncontrolled or controlled name heading fields</p> | <p>Move to the name heading field you want to use to generate a new name authority record.</p> <p>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 Record.</p> <p>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 <i>NEW</i> 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>MARC only</p> <p>Not available in Dublin Core template view.</p> |
| <p>Identify a non-filing leading article in a title (MARC 245 or DC Title)</p> | <p>Supply correct code in field 245 second indicator for the number of nonfiling characters (including spaces).</p> | <p>Surround the text of the article and any leading space(s) before the start of filing text in braces {}. Example: {The }</p> |

| Procedure | MARC Template | DC Template (Dublin Core) |
|--|--|--|
| View field-specific input guidelines | <p>Current variable field</p> <ul style="list-style-type: none"> On the Functions list for the field, click Help. <p>Any variable field (tag) or fixed field element</p> <ol style="list-style-type: none"> In the MARC Help text box (right side, record header), type the tag number or the element label. Click the MARC Help button. <p>Fixed field or field 006</p> <ul style="list-style-type: none"> For the fixed field or field 006, click an element label for help on the specific element. Or type the element label in the MARC Help text box and then click MARC Help. | On the Functions list for the element, click Help . |
| Add a MARC subfield and subfield delimiter | <ol style="list-style-type: none"> Enter a subfield delimiter (‡): <ul style="list-style-type: none"> Type a single dollar sign (\$). Press <Shift><4> to create the \$. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode. Type the appropriate lowercase letter and (optionally) 1 space. Then type the text of the subfield. (Optional) Type a space before any subsequent subfield delimiter. | Not applicable. |
| Enter a dollar sign as a currency symbol | To enter a dollar sign as a currency symbol (not to represent a subfield delimiter): Type 2 dollar signs (\$\$). Do not type a space between the 2 dollar signs. | Not applicable |

| Procedure | MARC Template | DC Template (Dublin Core) |
|---|---|---------------------------|
| <p>Specify language attribute for Dublin Core element DC Template only</p> | <p>Not applicable.</p> <p>DC Language attribute (Optional) Apply to any DC element. Possible uses of language attributes: automated indexing, speech synthesis applications. Note: the language attribute appears as lang=[value] in records exported as DC HTML.</p> <p>Specify language for element In the Language text box (right end of field, below Functions list), type the 2-letter code (iso 639-1) or, if no 2-letter code is available, the 3-letter code (iso 639-2: terminology) for the language you want to specify. Examples:</p> <ul style="list-style-type: none"> en (English) de (German) sgn (Sign language) <p>Add country code (optional) Following the language code, type a hyphen and then the 2-letter country code (iso 3166). Examples:</p> <ul style="list-style-type: none"> en-ca (Canadian English) sgn-us (Sign language used in United States) <p>Language codes Refer to the list at this URL: http://www.loc.gov/standards/iso639-2/englangn.html</p> <p>Country codes Refer to the list at this URL: http://www.iso.org/iso/en/prods-services/iso3166ma/02iso-3166-code-lists/list-en1.html</p> <p>Remove attribute In the Language text box, delete the text of the language code.</p> | |
| <p>Change fixed field to represent different bibliographic format</p> | <p>View the MARC fixed field. In the list box labeled Fixed Fields, select the type of material you are describing. Click the arrow to open the list; then click the type you want.</p> | <p>Not applicable.</p> |

| Procedure | MARC Template | DC Template (Dublin Core) |
|--|--|--|
| Specify OCLC Genre (Dublin Core only) | Not applicable. | <p>Procedure: select OCLC Genre term</p> <ol style="list-style-type: none"> 1. Find the OCLC Genre list box (top of record, above variable fields). 2. Open the list and click the term you want to use to categorize the resource described in the record. <p>MARC to DC mapping When you change the value of the Type element in the MARC fixed field, the system determines the appropriate OCLC Genre term and displays it in Dublin Core views.</p> |
| Create 006 field | <p>Go to the end of the record; the Create 006 option appears below the last record field, above the status area. Click the arrow to open the list of 006 types labeled Create 006. Then click the type of 006 field you want to add. The 006 editing area shows the type of 006 field you are creating. Below the label is a set of text boxes, 1 for each required element. In each text box, type a valid code for that element.</p> <p>Tip: For help on valid values for an element, click the hyperlinked element label to view information in <i>Bibliographic Formats and Standards</i>.</p> | Not applicable. |

| Procedure | MARC Template | DC Template (Dublin Core) |
|---|--|---|
| <p>Enter or edit LCCN (010 field, subfields a, b, and z)</p> | <p>When you add or correct an LCCN:</p> <ul style="list-style-type: none"> • Enter all non-blank characters. • Enter or omit the hyphen to separate the year from the serial number. • You need not enter leading blank spaces (1 to 3) in empty prefix positions. • If you include a hyphen, you may omit leading zeros (1 to 5) in empty number positions. If you omit the hyphen, you must supply the leading zeros. • You need not enter the final blank space (12th position) in a pre-2001 LCCN. <p>Validation errors on field 010 often result from too many characters in any portion of the LCCN, embedded blanks in any portion, missing letters or numbers, or (if you omit the hyphen) missing leading zeros in the serial number. More? See the next section, LCCN format details (field 010).</p> | <p>Not applicable.</p> |
| <p>View institution name for OCLC symbol in field 040</p> | <ul style="list-style-type: none"> • Move to field 040 and hover the mouse pointer over an OCLC symbol in subfield a, c, or d. <p>A popup window shows the name of the institution.</p> | <p>MARC only Not available in Dublin Core template view.</p> |
| <p>Edit field 040 (Turn off display of institution names)</p> | <ol style="list-style-type: none"> 1. Move to field 040. 2. In the Functions list, click Edit Field. 3. Edit field 040 as you wish. 4. When finished editing, in the Functions list click Show Institution. <p>Note: Field 040 is read-only by default, to let users view institution names for OCLC symbols. Select the Edit Field function when you need to modify the field.</p> | <p>MARC only Not available in Dublin Core template view.</p> |

Edit Bibliographic Records

Get a Dewey or Library of Congress classification number

First, you must set a classification scheme and specify the field for inserting the number:

| | Action |
|---|--|
| 1 | Click the General tab and in the Admin Options list, click Preferences . |
| 2 | On the Admin Options screen, click Cataloging Options and locate the Classify settings. |
| 3 | Click one of the following buttons to determine which classification scheme you want to use: <ul style="list-style-type: none"> • Dewey • Library of Congress (default) |
| 4 | In the Call Number Field , enter the tag of the field in which you want the class number inserted. Default: 090 |
| 5 | Click Save My Default or Save for Session . |

After you select the settings, to get a classification number:

| | Action |
|---|--|
| 1 | <p>With any bibliographic record open (a workform or a record from WorldCat, the save file, constant data, or Heritage Printed Book), in the Edit list, click Classify.</p> <p>Result - What to do:</p> <ul style="list-style-type: none"> • If a single numeric match is found, the most frequently used class number of the scheme you set is automatically inserted in the field you specified in the Cataloging Options screen, and the record is reformatted in correct MARC tag order. The action is completed and you are done. • If no numeric match is found, or if multiple matches are found, Connexion asks if you want to open the Classify Web service. Click OK or Cancel. <p>If you click Cancel, the prompt closes, and you are returned to the displayed record. You are done.</p> <p>If you click OK, a Classify window (titled Get Classification Number from Classify) opens. In this case, go to step 2.</p> |

| | Action |
|---|---|
| 2 | If no match was found and you open the Classify service window In the Title/Author search boxes, Connexion automatically: <ol style="list-style-type: none"> 1. Enters all of the data extracted from field 1XX \$a (where X = any number) and field 245 \$a of the bibliographic record, excluding subfield delimiters and codes. If no 1XX field exists, data is extracted from 245 \$a only. 2. Runs the search: <ul style="list-style-type: none"> Select a record. Or Edit the search criteria, click Search, and select a record from the results. |
| 3 | Scroll down to the Summary of classification number findings: <ol style="list-style-type: none"> 1. Highlight the classification number you want to use. 2. Press <Ctrl><C> to copy it to the clipboard. 3. Close the Classify browser window. 4. Add a field for the classification number you copied, enter the tag and paste the number in the field. |

Add or edit field 541 or 583 using guided entry

Field 541 (Immediate Source of Acquisition Note) and field 583 (Action Note) are used primarily when cataloging archival collections.

You can edit fields 541 and 583 directly, without expanding the field to use guided data entry. Or expand the field and use lists and text boxes to define indicator values and subfield content. Changes made directly are reflected if you expand the field for guided entry, and vice-versa.

Guided entry is available only in MARC Template view. In the MARC Text Area view, you can add field 541 or 583 and edit these fields as you would other variable-length fields in a bibliographic record.

When you retrieve a bibliographic record (or constant data record) in MARC Template view, or create a new record or CD record in that view, Connexion automatically inserts three empty guided-entry fields (indicated by a plus sign + button) at the end of the record or workform. To add field 541 or 583, type either tag in the first text box of an empty guided-entry field and click the plus sign + button to expand the field. Unused empty fields are removed when you reformat the record, save it, or take a final action.

Add field 541 or 583

To add these fields and use guided entry to complete them, you can type the desired tag in an empty guided-entry field automatically added to created or retrieved records. Or add an empty field manually, enter the desired tag, and reformat the record to enable guided entry.

| | Action | Result |
|---|---|---|
| 1 | Go to the end of the record to use one of the automatically-inserted empty guided-entry fields. Or To add an empty field, move to the field above the place where you want to add field 541 or 583. | |
| 2 | If you choose to add an empty field manually, in the Functions list click Add Single Field Below . | The inserted field duplicates the MARC tag of the preceding field. |
| 3 | In the empty field, type the desired tag (541 or 583) or change the tag to 541 or 583. | If you type any other tag number , you receive an error message when you reformat the record. |
| 4 | Reformat the record (or take any action that updates the record display. | If you add a field manually, redisplaying the record adds a plus sign + button at the left end of the 541 or 583 field to indicate that guided entry is available. Redisplaying the record also places the new field in tag-number sequence. If any guided-entry fields are open (expanded), reformatting causes the fields to close (collapse) automatically. Changes made, but not applied, using guided entry are lost when the field closes automatically.. |

Edit field 541 or 583

| Action | Procedure |
|---|--|
| Enter or edit content directly | In the text box for the field, define indicators and enter or edit appropriate subfield. |
| Expand (open) field | Click the Plus (+) button at the left end of the field. |
| Collapse (close) field and cancel changes | Click Cancel . |
| Collapse (close) field and apply changes | Click Apply . Result. Content in the main text box reflects changes made using guided entry. |
| Select indicator value or subfield value | Click the down-arrow button to open the list of values for the indicator or subfield. Then click the value you want. |
| View MARC Help | In the expanded field, click the hyperlinked label for an element. In the unexpanded field, on the Functions list, click Help . Or, in the MARC Help box (top or bottom of record), type the tag number. Then click MARC Help . |

| Action | Procedure |
|------------------------------------|--|
| Add a subfield (expanded field) | <ol style="list-style-type: none"> 1. Open the Action list to the right of the subfield that precedes the one you want to add. 2. Click Add Below. 3. At the added subfield, open the list of available subfields. 4. Click the type of subfield you want to add. |
| Delete a subfield (expanded field) | <ol style="list-style-type: none"> 1. Open the Action list to the right of the subfield you want to delete. 2. Click Delete. |
| Move a subfield (expanded field) | <ol style="list-style-type: none"> 1. Open the Action list to the right of the subfield you want to move. 2. Click the option you want. The choices depend on the current position of the subfield.. |

LCCN format details (field 010)

- After reformatting, Connexion displays the LCCN with no hyphen, 1-3 leading blanks in unoccupied prefix positions, 1-5 leading zeros in unoccupied number positions, and (pre-2001 LCCNs only) a trailing blank in position 12.
- In most cases, the system can supply blank spaces in the prefix and/or a final blank as required to format a valid LCCN; you need not enter blanks.
- If you enter the LCCN with a hyphen, you need not enter leading zeros in the serial number; the system can supply them. However, if you enter the LCCN without a hyphen, you must include leading zeros.
- The following tables provide details on required data entry formatting for both pre-2001 LCCNs (2-digit year) and current LCCNs (4-digit year).

| LCCN segment | Pre-2001 LCCN Length and position of segment | 2001 and later LCCN Length and position of segment |
|-------------------|--|--|
| Alphabetic prefix | Up to 3 letters Positions 1 through 3 1 to 3 leading blanks fill unoccupied positions Note: You need not enter leading blanks in the LCCN prefix. | 1 or 2 letters Positions 1 and 2 1 or 2 leading blanks fill unoccupied positions Note: You need not enter leading blanks in the LCCN prefix. |
| Year | 2 digits Positions 4 and 5 | 4 digits Positions 3 through 6 |
| Hyphen | Include or omit. Not retained or displayed in record. | Include or omit. Not retained or displayed in record. |
| Serial number | 1 to 6 digits Positions 6 through 11 1-5 leading zeros fill unoccupied positions Note: Enter leading zeros if you omit the hyphen. You may omit leading zeros if you include the hyphen. | 1 to 6 digits Positions 7 through 12 1-5 leading zeros fill unoccupied positions Note: Enter leading zeros if you omit the hyphen. You may omit leading zeros if you include the hyphen. |

| LCCN segment | Pre-2001 LCCN Length and position of segment | 2001 and later LCCN Length and position of segment |
|--------------------------------|--|--|
| Supplement blank | 1 blank after last digit of serial number Position 12 Note: You need not enter a final blank space. | Not needed |
| Examples of correct data entry | With hyphen abc98-123456_ ab98-3456 _a98-56_ a98-56 Without hyphen abc98123456_ abc98123456 _ab98003456 ab98003456 a98000056 | With hyphen ab2002-123456 a_2002-3456 a2002-3456 _2002-56 2002-56 Without hyphen ab2002123456 a_2002003456 a2002003456 _2002000056 2002000056 |

| LCCN type | Pre-2001 | 2001 |
|--------------------------|--|--|
| No prefix | Entered: 74-1513 Entered: 74001513 Formatted: ___74001513_ | Entered: 2002-277579 Entered: 2002277579 Formatted: __2002277579 |
| 1-letter prefix | Entered: a25-20 Entered: a25000020 Formatted: a__25000020_ | Entered: a2001-336783 Entered: a2001336783 Formatted: a_2001336783 |
| 2-letter prefix | Entered: cd25-20 Entered: cd25000020 Formatted: cd_25000020_ | Entered: cf2002-701624 Entered: cf2002701624 Formatted: cf2002701624 |
| 3-letter prefix | Entered: agr25-20 Entered: agr25000020 Formatted: agr25000020_ | Not used in post-2000 LCCNs. |
| Serial number 1 digit | Entered: 85-2 Entered: 85000002 Formatted: ___85000002_ | Entered: 2001-2 Entered: 2001000002 Formatted: __2001000002 |
| Serial number 2-5 digits | Entered: 00-42732 Entered: 00042732_ Formatted: ___00042732_ | Entered: 2001-58650 Entered: 2001058650 Formatted: __2001058650 |
| Serial number 6 digits | Entered: 00-687172 Entered: 00687172 Formatted: ___00687172_ | Entered: 2002-277579 Entered: 2002277579 Formatted: __2002277579 |

Fields that cite related records (760-787, 800, 810, 811, 830)

Use the **Insert from Cited Record** command (Functions list) to automatically insert data from a cited record that has a bibliographic connection to the record you are editing. Connexion inserts data based on rules for the type of field and for the type of record you are editing.

This function automates data insertion when you want to create fields that cite related records. Citing related records helps make the related items visible to users through WorldCat Local and WorldCat.org.

You can use the following fields to insert data from a separately cataloged but related item:

- Linked entry fields **760 - 787**

Examples:

- Relate a serial to its predecessor or successor.
- Relate versions of an item in different languages or formats.
- Relate a subseries to a main entry series.
- Relate in-analytic items (inseparable components of a host item), such as a track on a CD to the CD.
- Relate multipart items, such as a specific volume to a multi-volume set.

- Series added entry fields **800, 810, 811, 830**

Example:

- Relate a volume in a series to the series

Note: The “insert from cited record” function is available only in MARC Template view. It is not supported in DC Template view.

See the following table for instructions:

| Action | Procedure |
|--|--|
| <p>Add a linked entry field (tags 760 - 787)</p> | <p>1. Add a field and enter one of the following MARC tags: 760, 762, 765, 767, 770, 772, 773, 774, 775, 776, 777, 780, 785, 786, or 787</p> <p>2. Enter appropriate indicators.</p> <p>3. In the text box for the field, enter the OCLC control number of the related bibliographic record to be cited.</p> <p>4. In the Functions list click Insert from Cited Record.</p> <p>Results:</p> <ul style="list-style-type: none"> • Connexion extracts data from the cited record and adds it to the field you created. • The OCLC control number that you entered for the cited record appears in a subfield w and, by default, is hyperlinked to the cited record. <p>Note: See more below about changing the option and/or toggling the hyperlink off or on manually.</p> <p>Example:</p> <p>1. Create a field and enter tag 780, indicators 00, and OCLC number 11553638.</p> <p>2. Click Insert from Cited Record in the Functions list. Connexion puts the OCLC number in ¶w and enters the data from record 11553638. The field looks like this (except that the OCLC number in subfield w is hyperlinked by default):</p> <p>780 00 Episcopal Church. Diocese of Southern Ohio. t Journal of the ... annual convention ¶w (OCoLC)11553638</p> |
| <p>Add a series added entry field (tags 800, 810, 811, 830)</p> | <p>1. Add a field and enter one of the following MARC tags: 800, 810, 811, or 830</p> <p>2. Enter appropriate indicators.</p> <p>3. In the text box for the field, enter the OCLC control number of the related bibliographic record to be cited.</p> <p>4. In the Functions list click Insert from Cited Record.</p> <p>Results:</p> <ul style="list-style-type: none"> • Connexion extracts data from the cited record and adds it to the field you created. • The OCLC control number that you entered for the cited record appears in a subfield w. <p>Note: The OCLC number is not hyperlinked in these fields, nor can you hyperlink the OCLC number manually.</p> |
| <p>View the cited record</p> | <ul style="list-style-type: none"> • In a linked entry 7XX field that cites a related record, click the hyperlinked OCLC control number (unavailable for the 8XX fields which are not hyperlinked). <p>Result: Connexion opens a new browser window showing the cited record in display mode (read-only).</p> |
| <p>Edit the cited record</p> | <p>1. In a 7XX field that cites a related record, in the Functions list click Edit Cited Record.</p> <p>Result: The cited record and displays it in edit mode in the same browser window, replacing the record you were working with.</p> <p>2. To return to the record that contains the cited data:</p> <ol style="list-style-type: none"> a. In the Show Options list, click Active Records. b. In the Active Records screen, click the link to the record. |

| Action | Procedure |
|---|--|
| Change the option for hyperlinking the OCLC number (applies to fields 760 - 787 only) | 1. On the Cataloging Options screen, locate the Show Cited OCLC Control Numbers as Links setting. 2. Click to select one of the following buttons: — Show as Editable Text (prevents linking and simplifies revision of text in the field) Or — Show as Live Link (default) (allows you to open the cited record in read-only format) Note: This setting applies to linked entry fields 760 - 787 only. It does not apply to 8XX fields that are not hyperlinked. |
| Toggle the OCLC hyperlink off or on manually | 1. Put the cursor in one of the linked entry fields (760 - 787). 2. In the Functions list, click one of the following commands: — Unlink OCLC Number (to edit the field) Or — Link OCLC Number (to restore the hyperlink) |

3 Editing techniques: text area views

Keystroke shortcuts for editing

| To do this | Press |
|--|--|
| Move cursor between the first fixed-field element and the first variable fields. Note: In save file records, moves cursor to fixed field, variable fields, and the workflow status area. | <Alt></> (slash) |
| Move to the top or bottom of the record screen. | <Ctrl><Home> to move to the first input box on the screen. <Ctrl><End> to move to the last input box on the screen. |
| Go to the Active Records screen | <Ctrl><Shift><9> |

Edit in text area view

| Procedure | MARC Text Area | DC Text Area (Dublin Core) |
|--------------------------------|---|----------------------------|
| Change text | In the text area, use standard editing keys (<Insert>, <Backspace>, <Delete>, arrow keys) to move the insertion point and remove/add characters. | |
| Delete text | Press <Backspace> or <Delete> to delete text. Or Select the text. In the browser's menu bar, open the Edit menu and click Cut . Or right-click the selected text; on the popup menu click Cut . | |
| Undo text changes <Ctrl><Z> | <p>To reverse the most recent text change, use the standard Windows undo keystroke: <Ctrl><Z>.</p> <p>The following functions are supported in recent browser versions. Specific functionality may change with browser upgrades. Check browser Help or documentation for details.</p> <p>Undo last change, current text box: Press <Ctrl><Z> once.</p> <p>Undo series of changes, current text box: Press <Ctrl><Z> once to reverse each change, beginning with the last.</p> <p>Undo series of changes in different text boxes: Place the insertion point in the desired text box and then press <Ctrl><Z>.</p> <p>Begin with the text box most recently modified and return to the other text boxes in reverse order (retrace your steps).</p> <p>Notes on browser-based Undo Browser dependent. Support for <Ctrl><Z> varies with browser and version. Refresh clears undo memory. If you take an action that refreshes the screen (for example, select an item on the navigation bar, the Action list, or the Functions list for a field), the undo memory is cleared.</p> | |

| Procedure | MARC Text Area | DC Text Area (Dublin Core) |
|--|----------------|---|
| Enter diacritics and special characters Character chart window Internet Explorer for Windows only | | <ol style="list-style-type: none"> 1. Place the cursor where you want to insert a diacritic or special character. 2. Press <F7>. 3. In the Enter Diacritics and Special Characters window, click a character or diacritic to insert it at the cursor position. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. <p>Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol.</p> <p>(Note: Windows only. Not supported by Macintosh versions of IE.)</p> |
| Enter diacritics and special characters Bar syntax (mnemonic codes) | | <p>Enter diacritics and special characters using mnemonic codes.</p> <p>Diacritics.</p> <ol style="list-style-type: none"> 1. Type the code for a diacritic after the letter it modifies (Unicode syntax). 2. First type the letter modified by the diacritic. 3. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 4. Type the mnemonic for the diacritic. 5. Then type another vertical bar symbol. <p>Do not type a space between the letter and the code for the diacritic.</p> <p>Example: To enter an e with an acute accent, type e ac </p> <p>Special characters.</p> <ol style="list-style-type: none"> 1. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 2. Type the mnemonic for the special character. 3. Then type another vertical bar symbol. <p>Code list</p> <p>Note: appearance in edit mode</p> <ul style="list-style-type: none"> • Characters entered using this method are automatically replaced with typographic forms. • If you prefer, you can set an option to view the bar syntax in edit mode. |
| Table of ALA-defined diacritics and special characters | | <ul style="list-style-type: none"> • On the header bar (black bar at the top of every system screen), click Diacritics. <p>Use the table to identify a character, find a character by name, or copy a character for input in a record.</p> <p>For other ways to enter diacritics and special characters, as well as additional information, see Insert diacritics and special characters.</p> |

| Procedure | MARC Text Area | DC Text Area (Dublin Core) |
|------------------------------------|---|--|
| <p>Add single field or element</p> | <p>Move the insertion point to the end of the line above the place where you want to add a field. Press <Enter> to create a blank line and supply a right angle bracket (>). (Note: Angle bracket (>) supplied if using Internet Explorer browser; functionality not supported by Netscape browser.) Or Move the insertion point to the beginning of the line below the place where you want to add a field. Press <Enter> to create a blank line. Type a right angle bracket, the 3-digit tag, a space, indicator 1 (or a space), indicator 2 (or a space), a space, and then the text of the field. Do not type a space between the > and the first digit of the tag.</p> | <p>Move the insertion point to the end of the line above the place where you want to add an element. Press <Enter> to create a blank line and supply a right angle bracket (>). (Note: Angle bracket (>) supplied if using Internet Explorer browser; functionality not supported by Netscape browser.) Or Move the insertion point to the beginning of the line below the place where you want to add an element. Press <Enter> to create a blank line. Type a right angle bracket, a space, the element label, the qualifier (if any) separated from the element label with a period (.), a colon (:), a space, and then the text of the element. Or (DC TextArea only) Use the Add Element link below the text box. Open the list of elements and click the element you want to add. If using a qualifier, open the list of qualifiers (list includes qualifiers valid for the selected element type) and then click the one you want. Then click Add Element. The system adds the label for the element below existing elements in the text box.</p> |

| Procedure | MARC Text Area | DC Text Area (Dublin Core) |
|---------------------------------|---|---|
| Add multiple fields or elements | <p>Repeat the steps for adding one field.</p> <p>Or</p> <p>Select the text of a field you want to duplicate.</p> <p>In the browser's menu bar, open the Edit menu and click Copy.</p> <p>Move to the place where you want to insert another field.</p> <p>On the browser's Edit menu, click Paste. Repeat pasting the copied field if desired.</p> | <p>Repeat the steps for adding one element.</p> <p>Or</p> <p>Select the text of an element you want to duplicate.</p> <p>In the browser's menu bar, open the Edit menu and click Copy.</p> <p>Move to the place where you want to insert another element.</p> <p>On the browser's Edit menu, click Paste. Repeat pasting the copied element if desired.</p> <p>Or (DC TextArea only)</p> <p>Repeat the steps for using the Add Element link below the text box.</p> <p>Select the element label and/or qualifier you want to duplicate.</p> <p>Then click Add Element.</p> |
| Delete field or element | <p>Press <Backspace> or <Delete> to delete single characters.</p> <p>Or</p> <p>Select the text of the field. In the browser's menu bar, open the Edit menu and click Cut.</p> <p>Or right-click the selected text; on the popup menu click Cut.</p> | |
| Copy field or element | <p>Move to the field or element you want to copy.</p> <p>Select the text of the field/element.</p> <p>On the browser's Edit menu, click Copy. Or right-click the selected text; on the popup menu click Copy.</p> <p>Move to the field/element above the place where you want to insert the copied field/element.</p> <p>On the browser's Edit menu, click Paste. Or right-click at the desired position; on the popup menu click Paste.</p> | |
| Move field or element | <p>Scroll to the field or element you want to reposition.</p> <p>Select the text of the field/element.</p> <p>On the browser's Edit menu, click Cut. Or right-click the selected text; on the popup menu click Cut.</p> <p>Move to the field/element above the place where you want to insert the moved field/element.</p> <p>On the browser's Edit menu, click Paste. Or right-click at the desired position; on the popup menu click Paste.</p> | |

| Procedure | MARC Text Area | DC Text Area (Dublin Core) |
|--|---|--|
| Add authority control for field or element | <p>Not available.</p> <p>Workaround</p> <p>In the text area view, add a blank line and enter the tag and indicators (or element label, qualifier, scheme) for a heading field.</p> <p>Retrieve an authority record with the desired heading.</p> <p>Copy the heading from the authority record and paste it into the field/element you added in the text area of the bibliographic record.</p> <p>Switch to template view and control the field.</p> | |
| Edit (uncontrol) a controlled field or element | Not available. | Not available. |
| Identify a nonfiling leading article in a title (MARC 245 or DC Title) | Supply correct code in field 245 second indicator for the number of nonfiling characters (including spaces). | Surround the text of the article and any leading space(s) before the start of filing text in braces { }. Example: {The } |
| View field-specific input guidelines | <p>Any variable field (tag) or fixed field element</p> <ol style="list-style-type: none"> In the MARC Help text box (right side, record header), type the tag number or the element label. Click the MARC Help button. <p>Fixed field or field 006</p> <ul style="list-style-type: none"> For the fixed field or field 006, click an element label for help on the specific element. Or type the element label in the MARC Help text box and then click MARC Help. | Not available. |
| Add a MARC subfield and subfield delimiter | <ol style="list-style-type: none"> Enter a subfield delimiter (‡): <ul style="list-style-type: none"> Type a single dollar sign (\$). Press <Shift><4> to create the \$. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode. Type the appropriate lowercase letter and (optionally) 1 space. Then type the text of the subfield. (Optional) Type a space before any subsequent subfield delimiter. | Not applicable. |

| Procedure | MARC Text Area | DC Text Area (Dublin Core) |
|--|---|--|
| Enter a dollar sign as a currency symbol | To enter a dollar sign as a currency symbol (not to represent a subfield delimiter): Type 2 dollar signs (\$\$). Do not type a space between the 2 dollar signs. | Not applicable |
| Specify language attribute for Dublin Core element DC Template only | Not applicable. | Not available in DC Text Area view. Switch to DC Template view to specify language attributes. |
| Change fixed field to represent different bibliographic format | View the MARC fixed field. In the list box labeled Fixed Fields , select the type of material you are describing. Click the arrow to open the list; then click the type you want. | Not applicable. |
| Specify OCLC Genre (Dublin Core only) | Not applicable. | <p>Procedure: select OCLC Genre term</p> <ol style="list-style-type: none"> 1. Find the OCLC Genre list box (top of record, above variable fields). 2. Open the list and click the term you want to use to categorize the resource described in the record. <p>MARC to DC mapping When you change the value of the Type element in the MARC fixed field, the system determines the appropriate OCLC Genre term and displays it in Dublin Core views.</p> |
| Add 006 field | <p>Scroll to the end of the record; the Create 006 option appears below the MARC fixed field.</p> <p>Click the arrow to open the list of 006 types labeled Create 006. Then click the type of 006 field you want to add.</p> <p>The 006 editing area shows the type of 006 field you are creating. Below the label is a set of text boxes, 1 for each required element. Supply a value for each element; type a value in the text box or select a value from a list.</p> | Not applicable. |

| Procedure | MARC Text Area | DC Text Area (Dublin Core) |
|---|---|----------------------------|
| Enter or edit LCCN (010 field, subfields a, b, and z) | When you add or correct an LCCN: <ul style="list-style-type: none"> • Enter all non-blank characters. • Enter or omit the hyphen to separate the year from the serial number. • You need not enter leading blank spaces (1 to 3) in empty prefix positions. • If you include a hyphen, you may omit leading zeros (1 to 5) in empty number positions. If you omit the hyphen, you must supply the leading zeros. • You need not enter the final blank space (12th position) in a pre-2001 LCCN. <p>Validation errors on field 010 often result from too many characters in any portion of the LCCN, embedded blanks in any portion, missing letters or numbers, or (if you omit the hyphen) missing leading zeros in the serial number.</p> <p>More? See the next section, LCCN format details (field 010).</p> | Not applicable. |

LCCN format details (field 010)

- After reformatting, Connexion displays the LCCN with no hyphen, 1-3 leading blanks in unoccupied prefix positions, 1-5 leading zeros in unoccupied number positions, and (pre-2001 LCCNs only) a trailing blank in position 12.
- In most cases, the system can supply blank spaces in the prefix and/or a final blank as required to format a valid LCCN; you need not enter blanks.
- If you enter the LCCN with a hyphen, you need not enter leading zeros in the serial number; the system can supply them. However, if you enter the LCCN without a hyphen, you must include leading zeros.
- The following tables provide details on required data entry formatting for both pre-2001 LCCNs (2-digit year) and current LCCNs (4-digit year).

| LCCN segment | Pre-2001 LCCN Length and position of segment | 2001 and later LCCN Length and position of segment |
|--------------------------------|--|--|
| Alphabetic prefix | Up to 3 letters Positions 1 through 3 1 to 3 leading blanks fill unoccupied positions Note: You need not enter leading blanks in the LCCN prefix. | 1 or 2 letters Positions 1 and 2 1 or 2 leading blanks fill unoccupied positions Note: You need not enter leading blanks in the LCCN prefix. |
| Year | 2 digits Positions 4 and 5 | 4 digits Positions 3 through 6 |
| Hyphen | Include or omit. Not retained or displayed in record. | Include or omit. Not retained or displayed in record. |
| Serial number | 1 to 6 digits Positions 6 through 11 1-5 leading zeros fill unoccupied positions Note: Enter leading zeros if you omit the hyphen. You may omit leading zeros if you include the hyphen. | 1 to 6 digits Positions 7 through 12 1-5 leading zeros fill unoccupied positions Note: Enter leading zeros if you omit the hyphen. You may omit leading zeros if you include the hyphen. |
| Supplement blank | 1 blank after last digit of serial number Position 12 Note: You need not enter a final blank space. | Not needed |
| Examples of correct data entry | With hyphen abc98-123456_ ab98-3456 __a98-56_ a98-56 Without hyphen abc98123456_ abc98123456 _ab98003456 ab98003456 a98000056 | With hyphen ab2002-123456 a_2002-3456 a2002-3456 __2002-56 2002-56 Without hyphen ab2002123456 a_2002003456 a2002003456 __2002000056 2002000056 |

| LCCN type | Pre-2001 | 2001 |
|-----------------|--|--|
| No prefix | Entered: 74-1513 Entered: 74001513 Formatted: __74001513_ | Entered: 2002-277579 Entered: 2002277579 Formatted: __2002277579 |
| 1-letter prefix | Entered: a25-20 Entered: a25000020 Formatted: a__25000020_ | Entered: a2001-336783 Entered: a2001336783 Formatted: a_2001336783 |

Edit Bibliographic Records

| LCCN type | Pre-2001 | 2001 |
|--------------------------|--|--|
| 2-letter prefix | Entered: cd25-20 Entered: cd25000020 Formatted: cd_25000020_ | Entered: cf2002-701624 Entered: cf2002701624 Formatted: cf2002701624 |
| 3-letter prefix | Entered: agr25-20 Entered: agr25000020 Formatted: agr25000020_ | Not used in post-2000 LCCNs. |
| Serial number 1 digit | Entered: 85-2 Entered: 85000002 Formatted: __85000002_ | Entered: 2001-2 Entered: 2001000002 Formatted: __2001000002 |
| Serial number 2-5 digits | Entered: 00-42732 Entered: 00042732_ Formatted: __00042732_ | Entered: 2001-58650 Entered: 2001058650 Formatted: __2001058650 |
| Serial number 6 digits | Entered: 00-687172 Entered: 00687172 Formatted: __00687172_ | Entered: 2002-277579 Entered: 2002277579 Formatted: __2002277579 |

4 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. | |

Edit 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).

5 Insert diacritics and special characters

Diacritics and special characters in Connexion

Character sets supported in Connexion services

- **WorldCat:** Only the ALA Character set is fully supported. The ALA Character set is a defined character set widely used by libraries in English-speaking countries. **ALA** refers to the American Library Association. The ALA Character Set supports the representation of characters (primarily the Roman alphabet and some special characters) and diacritics commonly used in Latin-based/ influenced languages.
- **Authority File:** Only the ALA Character set is fully supported.
- **Pathfinders:** Full Unicode support.
- **Dewey Services:** Displays in Unicode.
- **Unicode encoded in UTF-8:** To maximize Connexion's potential as a Web-based system for use by agencies worldwide, Connexion uses the UTF-8 character format to communicate with Web browsers and as its internal storage format. UTF-8 is a compact encoding of Unicode, a widely adopted standard that supports the communication of a large array of characters from the world's chief languages and scripts.

| Connexion Database | Import | Editing/ Validation | Creation | Export |
|--------------------------------|-----------------------|--|-------------------|---|
| WorldCat | Conversion to Unicode | Unicode equivalents of ALA Character Set | ALA Character Set | OCLC MARC: ALA Character Set DC HTML & DC RDF: UTF-8 |
| Authority File | N/A | Unicode equivalents of ALA Character Set | ALA Character Set | MARC21: ALA Character Set |
| Pathfinder database | Conversion to Unicode | Unicode | Unicode | UTF-8 |
| WebDewey and Abridged WebDewey | N/A | N/A | N/A | N/A |

Exported records

- **Bibliographic records exported as Dublin Core** records in DC HTML or DC RDF have their content encoded in Unicode.
- **Bibliographic records exported as MARC21** records have their content encoded in the ALA Character Set.

**Character rendering:
bibliographic records
and authority records**

- **Authority records** are exported as MARC21 records and have their content encoded in the ALA Character Set.
- **Pathfinders** are exported as UTF-8 in HTML.
- In a browser-based environment, several factors beyond OCLC's control can interfere with entering and viewing diacritics and special characters in their customary typographic forms:
 - Type and version of Web browser
 - Fonts available for the specific browser and version
 - Limitations of display devices
 - Limitations of input devices
- To minimize the anticipated problems with editing and display, Connexion employs character handling techniques that impose reasonable consistency on the display and input of diacritics and special characters.

**Unicode fonts
recommended**

- For best results when viewing and editing records and pathfinders, and when viewing Web-based resources, specify a **Unicode font** in your browser (font settings are found in Options or Preferences). Using a Unicode font lets you take full advantage of the system's adoption of the Unicode standard for character encoding.
- For an extensive set of diacritics and special characters, OCLC recommends that you have the **Arial Unicode Microsoft** font (Arial Unicode MS) installed on your workstation and specified in your browser. Microsoft provides the font with many applications, including Microsoft Office 2000, Office XP, FrontPage 2000 or later, and Publisher 2002 or later. The **Lucida Sans Unicode** font, provided with Microsoft Windows 2000 and Windows XP, has a less-complete character set but may meet your needs.

Browser font settings

- **Note:** You must have the recommended fonts installed on your workstation before you can select them in your browser.

| Browser | Check or change font settings |
|--|---|
| Microsoft Internet Explorer Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Latin Based and User Defined language scripts. | <ol style="list-style-type: none"> 1. On the Tools menu click Internet Options. 2. In the Internet Options dialog box, on the General tab, click the Fonts button. 3. In the Fonts dialog box, from the Language Script list, select Latin Based. 4. Under Web Page Font, select Arial Unicode MS. 5. Under Plain Text Font, select a Unicode font if one is listed. 6. In the Fonts dialog box, from the Language Script list, select User Defined. 7. Under Web Page Font, select Arial Unicode MS. 8. Under Plain Text Font, select a Unicode font if one is listed. 9. Click OK to close the Fonts dialog box. Then click OK again to close the Internet Options dialog box. |

| Browser | Check or change font settings |
|--|--|
| <p>Netscape browsers Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Unicode and Western encoding.</p> | <p>Select fonts for Unicode encoding</p> <ol style="list-style-type: none"> 1. On the Edit menu click Preferences 2. In the left pane expand the Appearance category and then click Fonts. 3. In the right pane, from the Fonts For list, select Unicode. 4. From the Proportional list, select Sans Serif. 5. From the Sans Serif list, select Arial Unicode MS. 6. From the Monospace list, select Lucida Sans Unicode. 7. Click OK to apply the change and close the Preferences dialog box. <p>Select fonts for Western encoding</p> <ol style="list-style-type: none"> 1. Reopen the Preferences --> Fonts dialog box. 2. From the Fonts For list, select Western. 3. Repeat steps 4 through 7 to complete selecting Unicode fonts. |

Input and display: edit mode

Entry methods supported

1. As Unicode characters (e.g., a u with umlaut entered as ü, a British pound sterling symbol entered as £).
 - If using Internet Explorer, you can open a window that lets you click a graphic of the desired character to insert characters in the ALA-defined set. (Windows only: not supported by Macintosh versions of IE.)
 - Or** Type Unicode characters using a Unicode-enabled keyboard.
 - Or** Cut and paste Unicode characters from other sources such as the Connexion Diacritics window, other documents or the Windows Character Map utility.
2. Using a Connexion-modified, OCLC standard bar syntax.
 - Bar syntax represents a diacritic as a 2-character code between 2 pipe or vertical bar symbols (| |), placed beside the letter it modifies (e.g. a u with umlaut is entered as **u|um|**).
 - Bar syntax represents a special character as a 2-character code between two pipe or vertical bar symbols (| |) (e.g., a British pound sterling symbol is entered as **|ps|**).
 - Use the list of bar-syntax codes for diacritics and special characters from the ALA Character Set. The table of codes appears at the end of this section..

Display of ALA Character Set

- In edit mode, you can choose to display diacritics and special characters or to display their bar syntax coding. Use the option labeled Diacritics and Special Characters in Edit View on the Interface Customization Options screen.
- If you choose **Display Diacritic or Character** (default setting, Connexion displays the typographic forms of ALA characters in edit mode.

- If you choose **Display Bar Syntax**, Connexion automatically transforms all Unicode equivalents of the ALA Character Set diacritics and special characters into the Connexion-modified bar syntax when you take an action.
- When transformed to bar syntax, diacritics appear to the right of the characters they modify.

ALA Character Set

| ALA Character entry method | Example | Display Diacritic or Character option | Display Bar Syntax option |
|-----------------------------------|----------------|--|----------------------------------|
| Unicode character keyed or pasted | ü £ | ü £ | u um ps |
| Coded in bar syntax | u um | ü £ | u um ps |

Display of non-ALA Unicode characters

- Connexion displays the correct typographic forms of non-ALA Unicode characters, subject to limitations of the fonts installed on your workstation.,
- A character not available in the installed font is represented as an empty box.

Non-ALA Unicode Characters

| Non-ALA Character entry method | Example | Result in Edit Mode | Transformed Example |
|---------------------------------------|----------------|---|----------------------------|
| Unicode character keyed or pasted | ¥ | Unicode character Or Empty box if character not available in font | ¥ Or empty box |

Appearance in display mode

Diacritic appearance in display mode

| Letter + diacritic in record | Internet Explorer and Netscape (supported versions) |
|--|--|
| Character available in font (ALA or non-ALA) | Composed character |
| Character not available in font (ALA or non-ALA) | Letter followed by empty box |

Special character appearance in display mode

| Special character in record | Internet Explorer and Netscape (supported versions) |
|--|--|
| Character available in font (ALA or non-ALA) | Special character |
| Character not available in font (ALA or non-ALA) | Empty box |

Enter ALA-defined diacritics and special characters

1. **Character chart window (requires Internet Explorer).** With Internet Explorer, you can open a window that lets you click a graphic of the desired symbol to insert diacritics and special characters. **(Note: Windows only. Not supported by Macintosh versions of IE.)**
2. **Bar syntax coding method.** Represent **diacritics** as 2-character mnemonic codes entered between vertical bar (pipe) (|) symbols. To produce a **letter with a diacritic** above or below it, type the code for the diacritic after the letter it modifies. Represent **special characters** as 2-character mnemonic codes entered between vertical bar (pipe) (|) symbols.
3. **Unicode composed characters method.** Enter letters with diacritics in their composed typographic forms. Produce composed characters in your choice of 3 ways:
 - Use the keyboard, if you have a keyboard map that supports entry of Unicode characters.
 - Copy desired characters from other text and paste them into a record you are editing in Connexion.

Connexion diacritics table. Click **Diacritics** on the header bar to open a window that contains a table of ALA Character Set diacritics and special characters. See the section titled **Table of diacritics and special characters for identification and input** for more information about this feature.

Character set test records. A good source for characters is OCLC's set of character set test records. To find the character set test records, search WorldCat via Connexion for the OCLC control numbers #8448190, #8460397, and #8463440. Retrieving these records incurs a search charge. To avoid re-searching, save the test records.

Other Windows-based or Web-based text may work also. You may need to experiment to find the best sources.

- Use the Character Map utility (in the Accessories group on the Windows Start menu) in either Windows 2000 or Windows XP (Unicode-compliant operating systems).

Character chart window (Internet Explorer for Windows only)

| | Action |
|---|--|
| 1 | Place the cursor where you want to insert a diacritic or special character. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol. |
| 2 | <ul style="list-style-type: none"> • Press <F7>. |
| 3 | In the Enter Diacritics and Special Characters window, click a diacritic or special character to insert it at the cursor position. |
| 4 | When finished entering ALA characters, click Close . |

Bar syntax coding method

| |
|---|
| Action |
| <p>Letter with diacritic above or below</p> <ol style="list-style-type: none"> 1. First type the letter. 2. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 3. Then type the mnemonic for the diacritic. 4. Type another vertical bar symbol. <p>Example: To produce a u with umlaut type u um </p> <p>Special character</p> <ol style="list-style-type: none"> 1. Type a vertical bar (pipe) symbol (Shift + backslash on most keyboards). 2. Then type the mnemonic for the diacritic. 3. Type another vertical bar symbol. <p>Example: To produce a British pound symbol, type ps </p> |

Unicode keyboard or copy/paste method

| |
|---|
| Action |
| <ul style="list-style-type: none"> • Type the composed character (letter with diacritic) or special character using a Unicode enabled keyboard. <p>Or</p> <ol style="list-style-type: none"> 1. Copy the composed character (letter with diacritic) or special character from <ul style="list-style-type: none"> — The Connexion table of ALA characters. To view the table, click Diacritics on the header bar. — Another record or an OCLC character set test record. — The Windows Character Map — Other Windows-based or Web-based text. 2. Paste the character into the record. <p>Example: To produce a u with umlaut, type (or paste) ü</p> |

Entry rules for ligatures, paired diacritics, multiple diacritics

- Enter all diacritics to the right of the letter they modify.
- The following table shows how to apply this rule to enter more complex character/diacritic combinations.

| Diacritic | Entry rules |
|--|---|
| Ligatures i and a with ligatures | <p>Rule Enter letters and ligatures in this order: Letter1-LigatureLeft-Letter2-LigatureRight</p> <p>Examples</p> <p>i-LigatureLeft-a-LigatureRight = i a r </p> |
| Double tilde n and g with double tilde | <p>Rule Enter letters and tildes in this order: Letter1-TildeLeft-Letter2-TildeRight</p> <p>Examples</p> <p>n-TildeLeft-g-TildeRight = n t g tr </p> |
| Diacritic above and below a with dot below and circumflex r with circle below and macron | <p>Rule Enter letter and diacritics in this order: Letter-DiacriticBelow-DiacriticAbove</p> <p>Examples</p> <p>a . ^ = a db cf </p> <p>r ° ¯ = r cb ma </p> |

| Diacritic | Entry rules |
|---|---|
| Two diacritics above u with tilde and macron o with acute and circumflex a with grave and circumflex | Rule Enter diacritics from letter outward: Letter-DiacriticNearer-DiacriticFarther Examples u~̄ or u td ma o´^ = o ac cf a`^ = a gr cf |

Enter non-ALA Unicode characters

Unicode keyboard or copy/paste method. Produce characters in your choice of 3 ways:

1. Use the keyboard, if you have a keyboard map that supports entry of Unicode characters.
2. Copy desired characters from other text and paste them into a text box in Connexion. Any Windows-based or Web-based text may work. You may need to experiment to find the best sources.
3. Use the Character Map utility (in the Accessories group on the Windows Start menu) in either Windows NT 4.0 or Windows 2000 (Unicode-compliant operating systems).

| Action |
|---|
| <ul style="list-style-type: none"> • Type the composed character (letter with diacritic) or special character using a Unicode enabled keyboard. Or <ol style="list-style-type: none"> 1. Copy the composed character (letter with diacritic) or special character from another source or from the Windows Character Map. 2. Paste the character into the record. Example: To produce a yen currency symbol, type (or paste) ¥ |

Subfield delimiter and dollar sign (MARC edit views)

- To enter a subfield delimiter (‡) in MARC Template or MARC Text Area edit view,
 - Type a single **dollar sign (\$)**. Press <Shift><4> to create the \$. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode.
- To enter a **dollar sign** as a currency symbol (not to represent a subfield delimiter): In MARC Template or MARC Text Area edit view, type **2** dollar signs (**\$\$**). Do not type a space between the 2 dollar signs.

Table of diacritics and special characters for identification and input

About the table

While editing, you can consult a quick-reference table that lists

- Name of the diacritic or special character
- Bar-syntax mnemonic code for inputting the diacritic or character
- Examples that illustrate the appearance of the diacritic or character
- Languages in which the diacritic/character is used
- Notes on appropriate use (where applicable)

View the table of diacritics and special characters

| Action | Result |
|--|---|
| On the header bar (black bar at the top of every system screen), click Diacritics . | The table of diacritics and special characters appears in a new browser window. |

Use the table of diacritics and special characters

- **Review guidelines.** Before using the table, click the link **Guidelines for Use** to jump to important reminders and precautions. Please review this information before copying text from the table into a record.

| To | Do this |
|--|--|
| Find a character or language by name. | <ul style="list-style-type: none"> • On the browser's Edit menu (or Search menu), click Find. Or • Press <Ctrl><F> • In the Find dialog box, type the character name or language name and click OK. |
| Identify a character. | <ul style="list-style-type: none"> • Scroll the table and find the character image in the Examples column. |
| Copy and paste from the table to enter a diacritic or special character. | <ul style="list-style-type: none"> • Find the diacritic or character you want to use. • Select the bar-syntax code. Or • Select an image in the Examples column. • On the browser's Edit menu, click Copy. Or press <Ctrl><C>. • Switch to the browser window that contains the record you are editing. Click once in the record where you want to insert the character. • On the browser's Edit menu click Paste. Or press <Ctrl><V>. |

Bar syntax codes for diacritics and special characters

| To insert this symbol or character | Type this code |
|---|----------------|
| acute accent (diacritic) | ac |
| ae digraph lowercase | ae |
| AE digraph uppercase | AE |
| alif | al |
| ayn | ay |
| breve (diacritic) | br |
| candrabindu (diacritic) | cu |
| caret/circumflex (diacritic) (nonspacing) | cf |
| caret/circumflex (spacing) | ^ |
| cedilla (diacritic) | ce |

| To insert this symbol or character | Type this code |
|------------------------------------|----------------|
| circle above (diacritic) | ca |
| circle below (diacritic) | cb |
| high comma centered (diacritic) | cc |
| high comma off center (diacritic) | co |
| copyright mark | cs |
| d with cross bar lowercase | dc |
| D with crossbar uppercase | DC |
| degree sign | ds |
| dot below (diacritic) | db |
| dot in middle | dm |
| double acute (diacritic) | da |
| double dot below (diacritic) | dd |
| eth lowercase | et |
| Eth uppercase | ET |
| eszett | sz |
| euro | eu |
| grave (diacritic) (nonspacing) | gr |
| grave (spacing) | ` |
| hacek (diacritic) | ha |
| hook left (diacritic) | hl |
| hook right (diacritic) | hr |
| hooked o lowercase | ho |
| hooked O uppercase | HO |
| hooked u lowercase | hu |
| hooked U uppercase | HU |
| inverted cedilla (diacritic) | rc |
| inverted exclamation point ! | ie |
| inverted question mark ? | iq |
| I with slash, lowercase | pl |
| L with slash, uppercase | PL |
| left curly bracket | { |
| ligature left half (diacritic) | ll |
| ligature right half (diacritic) | lr |
| macron (diacritic) | ma |
| musical flat | mf |

| To insert this symbol or character | Type this code |
|------------------------------------|----------------|
| musical sharp | ms |
| miagkiy znak | mz |
| non-breaking space | |
| o with slash, lowercase | so |
| O with slash, uppercase | SO |
| oe digraph lowercase | oe |
| OE digraph uppercase | OE |
| plus or minus | pm |
| pound sterling | ps |
| pseudo question mark ? (diacritic) | pq |
| phonogram copyright mark | rs |
| right curly bracket | } |
| script l | sl |
| subscript patent mark | bp |
| subscript left parenthesis | b(|
| subscript right parenthesis | b) |
| subscript plus | b+ |
| subscript minus | b- |
| subscript 0 | b0 |
| subscript 1 | b1 |
| subscript 2 | b2 |
| subscript 3 | b3 |
| subscript 4 | b4 |
| subscript 5 | b5 |
| subscript 6 | b6 |
| subscript 7 | b7 |
| subscript 8 | b8 |
| subscript 9 | b9 |
| superior dot (diacritic) | sd |
| superscript left parenthesis | p(|
| superscript right parenthesis | p) |
| superscript plus | p+ |
| superscript minus | p- |
| superscript 0 | p0 |
| superscript 1 | p1 |
| superscript 2 | p2 |

| To insert this symbol or character | Type this code |
|-------------------------------------|----------------|
| superscript 3 | p3 |
| superscript 4 | p4 |
| superscript 5 | p5 |
| superscript 6 | p6 |
| superscript 7 | p7 |
| superscript 8 | p8 |
| superscript 9 | p9 |
| thorn, lowercase | it |
| thorn uppercase | IT |
| Turkish I | ti |
| tilde left (diacritic) | tl |
| tilde right (diacritic) | tr |
| tilde (diacritic) (nonspacing) | td |
| tilde (spacing) | ~ |
| tverdyi znak | tz |
| umlaut (diacritic) | um |
| underscore (diacritic) (nonspacing) | us |
| underscore double (diacritic) | ud |
| underscore (spacing) | – |
| upadhmaniya (diacritic) | up |

6 Enter Diacritics window

Use this window

- **Requires Internet Explorer browser.** To use the Enter Diacritics and Special Characters window, you must log on to Connexion using Microsoft Internet Explorer, version 5.5 or later.
- **Note: Windows only.** Not supported by Macintosh versions of IE.

Insert diacritics and characters from an ALA-defined set into

- Bibliographic records for items in languages other than English.
- Authority records for names and subjects in languages other than English.
- Pathfinders with content in languages other than English.

Open this window

| | Action |
|---|--|
| 1 | Place the cursor where you want to insert a diacritic or special character. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol. |
| 2 | <ul style="list-style-type: none"> • Press <F7>. |

Features

| Feature | How to use |
|--|--|
| Chart with graphics of diacritics and special characters | <ul style="list-style-type: none"> • View all characters and diacritics available for insertion in records. • Click a character or diacritic to insert it at the cursor position. • WorldCat and the Authority File support only the standard character set defined by the American Library Association (ALA). |
| Character list | <ul style="list-style-type: none"> • Click the name of a diacritic or special character to select it. The selected symbol is highlighted in the graphical chart. • When you point to a diacritic or special character in the chart, the name of that symbol appears in the Characters list box. • Default setting: None |
| Language list | <ul style="list-style-type: none"> • Click the name of a language to highlight in the chart diacritics and special characters used for that language. • The window retains your language selection until you choose another language. • Default setting: None |

Buttons

| Button | How to use |
|--------|---|
| Close | Close the window. |
| Help | View a context-specific Help topic that explains how to use the window. |

Entry procedure

| | Action |
|---|--|
| 1 | Place the cursor where you want to insert a diacritic or special character. <ul style="list-style-type: none"> • Note: Diacritic follows letter. To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. Example: To enter the letter u with an umlaut, type u. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the umlaut symbol. Enter ligatures, paired diacritics, or multiple diacritics |
| 2 | <ul style="list-style-type: none"> • Press <F7>. |
| 3 | In the Enter Diacritics and Special Characters window, click a diacritic or special character to insert it at the cursor position. |
| 4 | When finished entering ALA characters, click Close . |

Unicode fonts recommended

- For best results when viewing and editing records and pathfinders, and when viewing Web-based resources, specify a **Unicode font** in your browser (font settings are found in Options or Preferences). Using a Unicode font lets you take full advantage of the system's adoption of the Unicode standard for character encoding.
- For an extensive set of diacritics and special characters, OCLC recommends that you have the **Arial Unicode Microsoft** font (Arial Unicode MS) installed on your workstation and specified in your browser. Microsoft provides the font with many applications, including Microsoft Office 2000, Office XP, FrontPage 2000 or later, and Publisher 2002 or later. The **Lucida Sans Unicode** font, provided with Microsoft Windows 2000 and Windows XP, has a less-complete character set but may meet your needs.

Browser font settings

- **Note:** You must have the recommended fonts installed on your workstation before you can select them in your browser.

| Browser | Check or change font settings |
|---|--|
| <p>Microsoft Internet Explorer</p> <p>Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Latin Based and User Defined language scripts.</p> | <ol style="list-style-type: none"> 1. On the Tools menu click Internet Options. 2. In the Internet Options dialog box, on the General tab, click the Fonts button. 3. In the Fonts dialog box, from the Language Script list, select Latin Based. 4. Under Web Page Font, select Arial Unicode MS. 5. Under Plain Text Font, select a Unicode font if one is listed. 6. In the Fonts dialog box, from the Language Script list, select User Defined. 7. Under Web Page Font, select Arial Unicode MS. 8. Under Plain Text Font, select a Unicode font if one is listed. 9. Click OK to close the Fonts dialog box. Then click OK again to close the Internet Options dialog box. |
| <p>Netscape browsers</p> <p>Note: For best results with Connexion and other sites or applications, select Unicode fonts for both Unicode and Western encoding.</p> | <p>Select fonts for Unicode encoding</p> <ol style="list-style-type: none"> 1. On the Edit menu click Preferences 2. In the left pane expand the Appearance category and then click Fonts. 3. In the right pane, from the Fonts For list, select Unicode. 4. From the Proportional list, select Sans Serif. 5. From the Sans Serif list, select Arial Unicode MS. 6. From the Monospace list, select Lucida Sans Unicode. 7. Click OK to apply the change and close the Preferences dialog box. <p>Select fonts for Western encoding</p> <ol style="list-style-type: none"> 1. Reopen the Preferences --> Fonts dialog box. 2. From the Fonts For list, select Western. 3. Repeat steps 4 through 7 to complete selecting Unicode fonts. |

7 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. |

8 Review bibliographic or authority record

How record reviewing works

- Here is a high-level summary of the workflow for reviewing records.

| | Action | Result or Note |
|---|---|---|
| 1 | Reviewee identifies the appropriate reviewer(s). | Determined by: <ul style="list-style-type: none"> • Training and mentoring to qualify the reviewee to participate in a cooperative program (BIBCO, NACO, SACO, CONSER) • Arrangements made within a consortium or between cooperating institutions. • Informal, individual arrangements between colleagues |
| 2 | Reviewee enters the OCLC symbols of reviewer institutions, using the Reviewer Institutions option in Cataloging Options and/or Authority Options. | To set the list of institutions as the default reviewers, click Save My Default after entering the symbols. |
| 3 | Reviewee prepares a bibliographic or authority record and submits it for review by taking the Submit for Review action. | The system saves the record with the review status Submitted . |
| 4 | Reviewee notifies reviewer that a record is available for review. | Use e-mail, telephone, or any method convenient for reviewer and reviewee. |
| 5 | Reviewer retrieves record(s) to be reviewed. | Use the Search Save File screen (bibliographic save file or authority save file). In the Review File area, click Search or press <Enter>. |
| 6 | Reviewer communicates the necessary changes to the reviewee. | Use any method acceptable to both reviewer and reviewee. Possible methods include: e-mail, telephone, fax, postal mail, and Web-based conferences. |
| 7 | Reviewee retrieves and modifies the record. Then the reviewee: <ul style="list-style-type: none"> • Resubmits the record for further review and approval. Or • Takes the appropriate final action on the record. | To be determined by official procedures of a cooperative cataloging program or institution, or based on agreement between reviewer and reviewee. |

Edit Bibliographic Records

Why submit a record for review?

- You are required to submit work for review because you are a newly authorized participant in a cooperative cataloging program.
- Although you are not required to submit work for review, you have a question about a record you created or modified.

Who can submit records for review?

Any user with a Cataloging authorization, Limited level or above, can submit records for review and/or review a record submitted to the user's institution. Review procedures, selection of reviewers, record quality standards applied, and other details may vary depending on the program, institution, project, or other arrangement under which the review occurs.

Reviewee: Designate reviewer institutions

- Use Cataloging Options and/or Authority Options to indicate which institutions may access records you submit for review.
- Specifying a default list of reviewers is **optional**, but a default list can make submitting records for review more convenient.
- **No default reviewers specified.** If you do not specify default reviewers via Options, you must enter the appropriate symbol(s) each time you take the **Submit For Review** action. During each session, the system retains and displays the list you supplied in your most recent submittal. When you log off, the system deletes the list.
- **Default reviewers specified.** If you specify a list via Options, the system displays the default list when you take the **Submit For Review** action. You can use the default list as is, edit the list, or delete it and enter a new list. Modifications to the default list are retained for later submittals during the same session. When you log off, the system reverts to the default list. You can change the default reviewer list at any time using Cataloging Options or Authority Options.

| | Action |
|---|---|
| 1 | On the General tab, click Admin . On the Preferences screen, click Cataloging Options or Authority Options . |
| 2 | At the Cataloging Options screen or the Authority Options screen, locate the item Reviewer Institutions . In the text box, type 1 or more OCLC symbols for institutions whose staff may access records you submit for review. Separate multiple symbols with semicolons. The system ignores spaces before or after the semicolons. You can enter institution symbols in uppercase or lowercase. The system stores them in uppercase. Examples: ABC;DEF;XYZ or ABC; DEF; XYZ or abc;def;xyz |
| 3 | Save the list of reviewer institutions as the default for future sessions or use the list for the current session only. <ul style="list-style-type: none"> • Click Save My Default or Save for Session. Note: Symbols not verified Institution symbols specified in the Reviewer Institutions option are not checked when you save the settings on the Options screen. The system checks institution symbols for reviewers only when you submit a record for review. |

Reviewee: Submit a record for review

| | Action |
|---|---|
| 1 | <p>Prepare the bibliographic or authority record you want to submit for review. For example:</p> <ul style="list-style-type: none"> • Retrieve, lock, and edit a master record. • Retrieve and edit a record. • Retrieve a previously edited record or workform from the save file. • Create a new record. |
| 2 | <ol style="list-style-type: none"> 1. On the Action list, click Submit for Review or press <Alt><K><>> (right angle bracket). 2. 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. 3. Click OK to submit the record for review. Or click Cancel if you do not want to submit the record now. <p>Results 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. |

Reviewee: View your submitted records

- You can retrieve submitted records from the Show By Status screen or from the Search Save File screen.

Show By Status screen

| | Action |
|---|---|
| 1 | On the Cataloging tab or the Authorities tab, under Show Options, click By Status . |
| 2 | On the status list screen, under Show Save File, Review Status, select the check box for the Submitted status. |
| 3 | <p>Click Show Records or press <Enter>.</p> <p>Result The system retrieves all records your institution has submitted for review.</p> |

Search Save File screen

| | Action |
|---|---|
| 1 | On the Cataloging tab or the Authorities tab, under Search Options, click Save File . |
| 2 | On the Search Save File screen, in the Save File area, select the check box labeled Submitted for Review . |
| 3 | Click Search or press <Enter>. Result The system retrieves all records your institution has submitted for review. |

Reviewee: Recall submitted record

| | Action |
|---|--|
| 1 | Retrieve the record you want to recall. |
| 2 | <ol style="list-style-type: none"> 1. On the Action list, click Recall Submitted Record or press <Alt><K><<> (left angle bracket). 2. 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. |

Reviewer: View list of records for review

| | Action |
|---|--|
| 1 | On the Cataloging tab or the Authorities tab, under Search Options, click Save File . |
| 2 | On the Search Save File screen, in the Review File area, type an OCLC institution symbol in the text box. Or To retrieve all records available for your review, leave the text box empty. |
| 3 | <p>Click Search or press <Enter>.</p> <p>Result The system retrieves records submitted for your review by the institution whose symbol you specified. If you did not specify an institution symbol, the system retrieves all records for which your institution is designated as a reviewer.</p> <p>Note: Functions for reviewers Reviewers can:</p> <ul style="list-style-type: none"> • View a submitted record in display mode (read only). • Change the record view by selecting from the View list. <p>Reviewers cannot:</p> <ul style="list-style-type: none"> • Edit records. • Flag records. • Take any other action. <p>Note: Reviewee can act on a record while a reviewer views the record</p> <ul style="list-style-type: none"> • While you are reviewing a record, the reviewee (submitter) has full access to that record. • The reviewee can recall a submitted record or delete it from the save file at any time. Your view of the record remains open, but the recalled or deleted record is not retrieved when you re-search the Review File. • The reviewee can edit the record while you are viewing it. To view the revised record, return to the Review File results screen and reopen the record. You need not repeat the search. |

Reviewer and reviewee: Comments and responses

- The system does not handle communication between reviewer and reviewee.
- Review participants can use any method they wish to exchange status information, review comments, follow-up questions, and proposed revisions.
- Interactive review and revision. A reviewee can edit a submitted record while a reviewer is viewing that record. Using this functionality, reviewer and reviewee can discuss changes by phone while both view the record. Then, the reviewee can edit the record and resave it. To check the edits, the reviewer can return to a Review File results screen and reopen the record.

Edit Bibliographic Records

Reviewee: Revise record: take action or resubmit for review

| | Action |
|---|---|
| 1 | After receiving comments from a reviewer, retrieve the record you want to revise. |
| 2 | Revise the record to respond to corrections and suggestions from the reviewer. |
| 3 | Depending on the review procedure you are following or on direction from the reviewer, select the appropriate next step. For example: <ul style="list-style-type: none">• Take a final action on the record• Resubmit the revised record for further review• Delete the record from the save file |