

Use Bibliographic Constant Data

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OCLC Online Computer Library Center, Inc.
6565 Frantz Road, Dublin, OH 43017-3395

Revision History

Date	Section title	Description of changes
July 2004	1. Overview; 2. Apply CD by Name or from list; 3. Create constant data; 4. Edit constant data; 5. Use default CD; 7. Use CD results	Changed terminology to refer to constant data file (not CD database). Added information on procedure for retaining empty variable fields and/or subfields in CD records.
November 2004	1. CD overview	Revised to state that users can delete their default constant data record at any time.
November 2005	6. Find CD records	Added list of stopwords for searching the bibliographic CD file.

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6565 Frantz Road
Dublin, OH 43017-3395 USA

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1 Constant data overview

Constant data for bibliographic records

- **Constant data record.** A set of MARC fields or Dublin Core elements that contains data your library uses for creating or editing bibliographic records. Constant data records are stored in a constant data file shared by users at your library. Your constant data records are not available to Connexion users at other institutions.
 - You have two ways to apply any specific constant data record to a bibliographic record you are editing.
 - Apply CD By Name.** Type the name of the CD record you want to apply.
 - Apply CD From List.** Select the CD record to apply from a list of your library’s existing constant data records.
- **Default bibliographic constant data.** One default bibliographic constant data record is associated with each Connexion authorization during each session.
 - You can set any constant data record saved in the bibliographic constant data file as your default bibliographic constant data.
 - At any time, you can edit your default bibliographic constant data or select another bibliographic constant data record to set as your default CD.
 - When you take the **Apply Default CD** action, your default constant data is applied to the bibliographic record you are editing.
 - You must have at least one constant data record in the constant data file before the option Set as Default Constant Data is available.
 - Shared authorizations.** All users of a shared authorization share **one** default constant data record. If one edits the default CD record associated with a shared authorization, or selects a different CD record as the default, the change is affects all other users of that authorization.

Apply constant data and specify fields to apply

Connexion provides three ways to apply any constant data record to a bibliographic record and specify which CD fields to apply:

Methods to apply a CD record and specify fields to apply	Procedures
Type the name of a constant data record to apply Specify fields when you select and apply the CD record	<ol style="list-style-type: none"> 1. Retrieve the bibliographic record to which you want to apply a constant data record. The record must be in edit mode. 2. On the Edit list, click Apply CD By Name or press <Alt><K> and then <5> (or <Alt><J> and then <5>). An entry opens above the record header. 3. Specify fields to apply. In the entry area, select the option button for Whole Record or Variable Fields Only or Fixed Field Only. 4. In the Specific CD Name text box, type the name of the constant data record you want to apply. 5. Click Apply CD or press <Enter>.

Methods to apply a CD record and specify fields to apply	Procedures
<p>Select a constant data record to apply from a list of all your CD records</p> <p>Specify fields when you select and apply the CD record</p>	<ol style="list-style-type: none"> 1. Retrieve the bibliographic record to which you want to apply a constant data record. The record must be in edit mode. 2. On the Edit list, click Apply CD From List or press <Alt><K> and then <6> (or <Alt><J> and then <6>). 3. Specify fields to apply. In the Select Constant Data window, select the option button for Whole Record or Variable Fields Only or Fixed Field Only. 4. In the list of constant data records, click the hyperlinked name of the constant data record you want to apply.
<p>Edit default CD record to specify fields before you apply default CD</p>	<ol style="list-style-type: none"> 1. Edit default constant data. On the Cataloging tab, under Show Options, click Default CD. 2. Specify fields to apply in default constant data. At the top of the default constant data, select the option button for Whole Record or Fixed Field Only or Variable Fields Only. 3. Update default constant data. On the Edit list click Set as Default Constant Data and then click OK to confirm that you want to overwrite your default constant data. 4. Apply default constant data. Return to the bibliographic record you are editing. On the Edit list click Apply Default CD or press <Alt><K> and then <C> (or <Alt><J> and then <C>).

Constant data records and default constant data

Bibliographic constant data record	Default bibliographic constant data
<p>Resides in the bibliographic constant data file for your library.</p>	<p>Bibliographic constant data record associated with your authorization and with your current session. Resides in the bibliographic constant data file for your library.</p>
<p>Stored in the bibliographic constant data file until a user from your library deletes it.</p>	<p>Remains the default bibliographic constant data for your authorization until you select another record as your default CD. Stored in the bibliographic constant data file until a user from your library deletes it.</p>

Bibliographic constant data record	Default bibliographic constant data
<p>Apply to a bibliographic record In the record you are editing,</p> <ul style="list-style-type: none"> On the Edit list, click Apply CD By Name or press <Alt><K> and then <5>. Type the name of the CD record to apply and click Apply CD. Or On the Edit list, click Apply CD From List or press <Alt><K> and then <6>. In the list, click the name of the CD record to apply. 	<p>Apply to a bibliographic record In the record you are editing, on the Edit list click Apply Default CD or press <Alt><K> and then <C>.</p> <p>Or</p> <p>Apply to multiple records Retrieve a group of records from the bibliographic save file. On the search results screen, flag the records. On the Action/Sort list, click Apply Default CD to Flagged Records.</p>
<p>To edit a bibliographic constant data record Retrieve the record from the bibliographic constant data file, edit the record, and then save (replace) the edited version in the bibliographic constant data file.</p> <p>To create a new constant data record On the Cataloging tab, under Create, click Constant Data. At the Create Constant Data screen, select the constant data format and click Create. Enter the content you want in the bibliographic constant data record, and then save (add) the new record to the bibliographic constant data file.</p>	<p>To edit default bibliographic constant data On the Cataloging tab, under Show Options, click Default CD. Edit the default constant data. When finished revising, resave the record to replace it in the bibliographic CD file.</p> <p>Or</p> <p>Retrieve the default CD record from the bibliographic constant data file, edit the record, and then save (replace) the edited version in the file.</p> <p>To make another record your default CD record Retrieve a record from the bibliographic constant data file and take the Set as Default Constant Data action.</p>
<p>Shared with all users from your library.</p>	<p>Shared with all users from your library.</p>
<p>Editing changes the stored record when you save (replace) the previous version with the revised version. You cannot add an edited bibliographic constant data record to the file with a new name to avoid replacing the original constant data record.</p>	<p>Changes to your default CD affect the bibliographic constant data record stored in your library's bibliographic constant data file.</p>
<p>The Apply CD By Name action or the Apply CD From List action lets you choose which MARC fields (fixed field, variable fields, or both) to apply to a bibliographic record.</p>	<p>The Apply Default CD action automatically applies the MARC fields designated when you last edited the default constant data record. To change which MARC fields are applied, you must edit the default constant data record before you take the Apply Default CD action.</p>

Bibliographic constant data record	Default bibliographic constant data
<p>Can be deleted. Retrieve a bibliographic constant data record and take the Delete Constant Data Record action. Or On a list of retrieved constant data records, flag the records you want to delete and then take the Delete Flagged Records action.</p>	<p>Can be deleted by you or another user at your library. If you take the Apply Default CD action after your default CD record has been deleted, or before you have designated a CD record as your default CD, the system displays an error message.</p>

Actions available for constant data records

Display mode

List	Action	Meaning/Purpose
Edit	Edit Constant Data Record	Go to edit mode to modify the constant data record.
	Derive New Constant Data Record	Create a new constant data record based on the displayed CD record.
	Set as Default Constant Data	Designate the displayed constant data record as your default constant data.
Action	Delete Constant Data Record	Remove the displayed constant data record from your library's constant data file.
	Print Record	Print the displayed constant data record.

Edit mode

List	Action	Meaning/Purpose
Edit	Cancel Changes	Discard changes made to the constant data record since you began editing.
	Check URL Status	Verify all URLs in the current record.
	Derive New Constant Data Record	Create a new constant data record based on the CD record you are editing.
	Display Constant Data Record	Go to a display view of the constant data record you are editing.
	Reformat Record	Reorder fields and delete empty fields in the constant data record you are editing.
	Set as Default Constant Data	Designate the constant data record you are editing as your default constant data.

Use Bibliographic Constant Data

List	Action	Meaning/Purpose
Action	Delete Constant Data Record	Remove the displayed constant data record from your library's constant data file.
	Print Record	Print the displayed constant data record.
	Save Constant Data Record	New constant data record. Add the constant data record you are editing to your library's bibliographic constant data file.
	Save Constant Data Record	Existing constant data record. Use the edited version of the bibliographic constant data record to replace the previous version in your library's bibliographic constant data file.

2 Apply constant data by name or from list

Two ways to apply a specific CD record

- **Apply CD By Name.** Type the name of the CD record you want to apply.
- **Apply CD From List.** Select the CD record to apply from a list of your library's existing constant data records.
- With either method, you can
 - Retrieve and apply any existing bibliographic constant data record.
 - Apply a bibliographic constant data record without first making it your default constant data.
 - Specify which MARC constant data fields to apply after selecting a CD record.

Apply bibliographic constant data by name

	Action
1	<ul style="list-style-type: none"> • Retrieve a bibliographic record or create a new record and begin editing. Edit mode only. You must be in edit mode to apply constant data.
2	<ul style="list-style-type: none"> • On the Edit list, click Apply CD By Name or press <Alt><K> and then <5> (or <Alt><J> and then <5>). An entry area opens above the record header.
3	(Optional) Specify which fields of the constant data record you want applied to the bibliographic record. <ul style="list-style-type: none"> • Click to select the option button for Whole Record or Variable Fields Only or Fixed Field Only. • Default setting: Variable Fields Only. Dublin Core format: whole CD record always applied. If you are editing a record in Dublin Core Template or Dublin Core Text Area view, you cannot specify which constant data fields to apply. The system always applies the entire CD record.

	Action
4	<p>1. In the Specific CD Name text box, type the name of the constant data record you want to apply.</p> <p>2. Click Apply CD or press <Enter>.</p> <p>Results</p> <ul style="list-style-type: none"> • MARC constant data fields applied. Depending on the option you selected, the system adds the entire record, the fixed field only, or the variable fields only. <ul style="list-style-type: none"> — Fixed field: Values of elements in the fixed field (008 and Leader) replace corresponding elements in the record, unless the constant data contains asterisks (*) in place of a value. Or select Variable Fields Only to preserve all fixed field values. — Repeatable variable fields in constant data are added to the bibliographic record. Repeatable fields in constant data do not replace corresponding variable fields in the record. Edit the resulting record to combine or delete unwanted repeated variable fields. — Nonrepeatable variable fields Nonrepeatable fields in constant data replace corresponding variable fields in the record. — Empty variable fields: To retain an empty variable field in constant data, In the constant data record, include the appropriate MARC tag or DC element label and either type a few characters in the content area or type \$a [BLANK] (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical ba). — Subfields: If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain empty subfield codes in a variable field in constant data, type the following after each subfield code: [BLANK]. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field. • Format mismatch warning. If the MARC format of the selected CD record does not match the format of the bibliographic record, the system displays a warning message. To cancel applying the mismatched CD record, click Cancel. <p>Note: The system does not compare formats if you choose to apply Variable Fields Only.</p> • Dublin Core elements in constant data are added to the bibliographic record; constant data elements do not replace corresponding elements in the bibliographic record. Edit the resulting record to combine or delete unwanted repeated elements.

Use Bibliographic Constant Data

	Action
5	Make any other changes you wish to complete the record.
6	<p>Save the record for further processing and/or review.</p> <ul style="list-style-type: none"> On the Action list, click Save Record to add the record to the bibliographic save file. Assign a status appropriate for the record's position in your workflow. <p>Or</p> <p>Take a final action on the record.</p> <ul style="list-style-type: none"> New record. On the Action list click Update Holdings or Produce and Update Holdings or Alternate Produce and Update. Existing record, not locked. On the Action list, click Update Holdings or Produce and Update Holdings or Alternate Produce and Update or Export Record in [MARC or DC HTML or DC RDF]. Locked master record. On the Action list, click Replace Record or Replace and Update Holdings.

Apply bibliographic constant data from list

	Action
1	<ul style="list-style-type: none"> Retrieve a bibliographic record or create a new record and begin editing. Edit mode only. You must be in edit mode to apply constant data.
2	<ul style="list-style-type: none"> On the Edit list, click Apply CD From List or press <Alt><K> and then <6> (or <Alt><J> and then <6>). <p>The Select Constant Data window appears, listing your library's bibliographic constant data records. The list is sorted alphabetically by constant data name.</p>
3	<p>(Optional) In the Select Constant Data window, specify which fields of the constant data record you want applied to the bibliographic record.</p> <ul style="list-style-type: none"> Click to select the option button for Whole Record or Variable Fields Only or Fixed Field Only. Default setting: Variable Fields Only. <p>Dublin Core format: whole CD record always applied.</p> <p>If you are editing a record in Dublin Core Template or Dublin Core Text Area view, you cannot specify which constant data fields to apply. The system always applies the entire CD record.</p>

	Action
4	<ul style="list-style-type: none"> In the list of constant data records, click the hyperlinked name of the constant data record you want to apply. <p>Results</p> <ul style="list-style-type: none"> MARC constant data fields applied. Depending on the option you selected, the system adds the entire record, the fixed field only, or the variable fields only. <ul style="list-style-type: none"> Fixed field: Values of elements in the fixed field (008 and Leader) replace corresponding elements in the record, unless the constant data contains asterisks (*) in place of a value. Or select Variable Fields Only to preserve all fixed field values. Repeatable variable fields in constant data are added to the bibliographic record. Repeatable fields in constant data do not replace corresponding variable fields in the record. Edit the resulting record to combine or delete unwanted repeated variable fields. Nonrepeatable variable fields Nonrepeatable fields in constant data replace corresponding variable fields in the record. Empty variable fields: To retain an empty variable field in constant data, In the constant data record, include the appropriate MARC tag or DC element label and either type a few characters in the content area or type \$a [BLANK] (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical ba). Subfields: If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain empty subfield codes in a variable field in constant data, type the following after each subfield code: [BLANK]. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field. Format mismatch warning. If the MARC format of the selected CD record does not match the format of the bibliographic record, the system displays a warning message. To cancel applying the mismatched CD record, click Cancel. Note: The system does not compare formats if you choose to apply Variable Fields Only. Dublin Core elements in constant data are added to the bibliographic record; constant data elements do not replace corresponding elements in the bibliographic record. Edit the resulting record to combine or delete unwanted repeated elements.
5	Make any other changes you wish to complete the record.
6	<p>Save the record for further processing and/or review.</p> <ul style="list-style-type: none"> On the Action list, click Save Record to add the record to the bibliographic save file. Assign a status appropriate for the record's position in your workflow. <p>Or</p> <p>Take a final action on the record.</p> <ul style="list-style-type: none"> New record. On the Action list click Update Holdings or Produce and Update Holdings or Alternate Produce and Update. Existing record, not locked. On the Action list, click Update Holdings or Produce and Update Holdings or Alternate Produce and Update or Export Record in [MARC or DC HTML or DC RDF]. Locked master record. On the Action list, click Replace Record or Replace and Update Holdings.

3 Create constant data records

Why create constant data records?

- Avoid rekeying frequently used information.
- Reduce typing errors and improve consistency among related records.
- Add specific fields or elements to multiple bibliographic records.
- Develop and maintain standards for use in all bibliographic records, for certain collections, or for specific types of resources.

Apply constant data and specify fields to apply

- Once you create and save a constant data record, you can apply the constant data to a bibliographic record in three ways: **Apply Default CD** or **Apply CD By Name** or **Apply CD From List**.
- Each function lets you specify whether to apply the whole CD record, the fixed field only, or the variable fields only.

About constant data records

- Users at the same institution (same OCLC symbol) share a constant data file that contains constant data records for use within the system.
- Any user at an institution can add constant data records to this file, edit existing constant data records, use a stored record as default constant data, or delete constant data records.
- Your library's constant data records are not shared with Connexion users at any other institution.

Create a constant data record from a workflow

	Action
1	On the Cataloging tab, under Create Options, click Constant Data . The Create Constant Data screen appears.
2	<p>At the top of the screen</p> <ul style="list-style-type: none"> • Select the format to use for constant data. <ul style="list-style-type: none"> — Open the list labeled using the ___ format. — Click the format in which you normally edit bibliographic records (MARC Template or MARC Text Area or DC Template or DC Text Area). • Select a workflow for the constant data record. <ul style="list-style-type: none"> — Open the list of workflows and click the workflow you want to use. <p>Record format determines workflows available</p> <ul style="list-style-type: none"> • MARC format: Books, Computer Files, Maps, Mixed Materials, Scores, Serials, Sound Recordings, Visual Materials • Default MARC workflow: Books • Dublin Core format: Collection; Collection, instructional; Computer file; Computer software; Electronic journal; Electronic online service; Image data/Image data, moving; Map data; Map data, manuscript; Physical object; Sound data, musical; Sound data, nonmusical; Text data; Text data, manuscript; Text data, music; Text data, music manuscript • Default Dublin Core workflow: Text data
3	Click Create or press <Enter>. The system displays a blank workflow in the edit view you specified.
4	<p>Enter content you want to reuse in multiple bibliographic records.</p> <ul style="list-style-type: none"> • Insert empty fields or elements via constant data. In the constant data record, include the appropriate MARC tag or DC element label and either type a few characters in the content area or type \$a [BLANK] (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical bar). (Constant data does not retain fields/elements that contain no data.) • Retain empty subfields in variable fields. If variable fields in default constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain empty subfield codes in a variable field in constant data, type the following after each subfield code: [BLANK]. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field. • Protect fixed-field elements in records. By default, the fixed field in constant data overwrites the fixed field in a record. You can prevent a specific element in the constant data fixed field from replacing that element in the fixed field of a bibliographic record. In the constant data record, type asterisks (*) in the text box for the element. Type 1 asterisk for each character of the element value. For example, to preserve the value for the Lang element in bibliographic records, type *** in the Lang element of the constant data record.

	Action
5	<p>Save the new constant data record.</p> <ul style="list-style-type: none"> On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
6	<ol style="list-style-type: none"> At the top of the screen, in the text box, enter a name for the bibliographic constant data record. Use a name that indicates the content or purpose of the constant data. Set as default CD. If desired, select the check box labeled Make this your default constant data? My Status. If desired, enter text in the My Status text box to help you identify and retrieve the new CD record. For example, enter your name or initials, a date, or a project number. Note: You can define a default My Status for bibliographic CD records in Cataloging Options. The default My Status automatically appears in new CD records; you can edit the default text if desired. Then click Yes to add the new CD record to your institution's bibliographic constant data file. <p>Results</p> <ul style="list-style-type: none"> When you click Yes, the system adds the new bibliographic constant data record and displays a confirmation message. Then the system redisplay the bibliographic constant data record as saved: empty fields are removed. The constant data name you supplied appears at the top of the new bibliographic constant data record.

Create a constant data record from a bibliographic record

- The Derive New Constant Data Record action creates a constant data record with the content of any bibliographic record.

	Action
1	<p>Locate the bibliographic record on which to base a constant data record.</p> <p>Retrieve record.</p> <ol style="list-style-type: none"> Search WorldCat, the bibliographic save file, or the Resource Catalog to retrieve a results list that contains the record you want. Select the record.
2	<ol style="list-style-type: none"> On the Edit list click Derive New Constant Data Record or press <Alt><K> and then <4> (or <Alt><J> and then <4>). When the system asks whether you want to transfer fixed-field values to the new CD record, <ul style="list-style-type: none"> Click Yes to transfer all fixed-field values except Entered and Replaced. (Note: Both Entered and Replaced are set to the current date.). Click No to transfer only default fixed-field values for the format, as indicated by the value in the Type element. Click Cancel to cancel deriving a new CD record. <p>Results</p> <p>The system displays the content of the new constant data record. Variable fields transfer based on your settings for the Derive Record Fields option (Cataloging Options screen).</p>
3	<p>Complete editing the new CD record.</p>

	Action
4	<p>Save the new constant data record.</p> <ul style="list-style-type: none"> On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
5	<ol style="list-style-type: none"> At the top of the screen, in the text box, enter a name for the bibliographic constant data record. Use a name that indicates the content or purpose of the constant data. Set as default CD. If desired, select the check box labeled Make this your default constant data? My Status. If desired, enter text in the My Status text box to help you identify and retrieve the new CD record. For example, enter your name or initials, a date, or a project number. Note: You can define a default My Status for bibliographic CD records in Cataloging Options. The default My Status automatically appears in new CD records; you can edit the default text if desired. Then click Yes to add the new CD record to your institution's bibliographic constant data file. <p>Results</p> <ul style="list-style-type: none"> When you click Yes, the system adds the new bibliographic constant data record and displays a confirmation message. Then the system redisplay the bibliographic constant data record as saved: empty fields are removed. The constant data name you supplied appears at the top of the new bibliographic constant data record.

Create a constant data record from an existing constant data record

	Action
1	Retrieve and view the constant data record on which to base a new bibliographic constant data record.
2	<ol style="list-style-type: none"> On the Edit list click Derive New Constant Data Record or press <Alt><K> and then <4> (or <Alt><J> and then <4>). When the system asks whether you want to transfer fixed-field values to the new CD record, <ul style="list-style-type: none"> Click Yes to transfer all fixed-field values except Entered and Replaced. (Note: Both Entered and Replaced are set to the current date.). Click No to transfer only default fixed-field values for the format, as indicated by the value in the Type element. Click Cancel to cancel deriving a new CD record. <p>Results</p> <p>The system displays the content of the new constant data record. Variable fields transfer based on your settings for the Derive Record Fields option (Cataloging Options screen).</p>
3	Complete editing the new CD record.

	Action
4	<p>Save the new constant data record.</p> <ul style="list-style-type: none"> • On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
5	<ol style="list-style-type: none"> 1. At the top of the screen, in the text box, enter a name for the bibliographic constant data record. Use a name that indicates the content or purpose of the constant data. 2. Set as default CD. If desired, select the check box labeled Make this your default constant data? 3. My Status. If desired, enter text in the My Status text box to help you identify and retrieve the new CD record. For example, enter your name or initials, a date, or a project number. Note: You can define a default My Status for bibliographic CD records in Cataloging Options. The default My Status automatically appears in new CD records; you can edit the default text if desired. 4. Then click Yes to add the new CD record to your institution's bibliographic constant data file. <p>Results</p> <ul style="list-style-type: none"> • When you click Yes, the system adds the new bibliographic constant data record and displays a confirmation message. • Then the system redisplay the bibliographic constant data record as saved: empty fields are removed. • The constant data name you supplied appears at the top of the new bibliographic constant data record.

4 Edit constant data

Edit default constant data

	Action
1	<p>On the Cataloging tab, under Show Options, click Default CD. Or Search bibliographic constant data and select the default CD record from the results list.</p>
2	<p>Make the necessary changes to your default constant data.</p> <ul style="list-style-type: none"> • Insert empty fields or elements via constant data. In the constant data record, include the appropriate MARC tag or DC element label and either type a few characters in the content area or type \$a BLANK (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical bar). (Constant data does not retain fields/elements that contain no data.) • Retain empty subfields in variable fields. If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain empty subfield codes in a variable field in constant data, type the following after each subfield code: BLANK . (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field. • Protect fixed field elements in records. By default, the fixed field in constant data overwrites the fixed field in a record. You can prevent a specific element in the constant data fixed field from replacing that element in the fixed field of a bibliographic record. In the constant data record, type asterisks (*) in the text box for the element. Type 1 asterisk for each character of the element value. For example, to preserve the value for the Lang element in bibliographic records, type *** in the Lang element of the constant data record.
3	<p>Specify fields to apply (MARC format only). In the MARC Template or MARC Text Area edit view of default constant data, the MARC Fields to Apply option appears at the top of the screen. The setting for this option determines which fields of MARC constant data are applied to a bibliographic record when you take the Apply Default CD action. Select Whole Record or Variable Fields Only or Fixed Field Only.</p>
4	<p>Replace the edited record in the constant data file.</p> <ul style="list-style-type: none"> • On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>). <p>The system asks you to confirm that you want to replace the previous version of the record with the revised version.</p> <ul style="list-style-type: none"> • Click Yes to replace the existing record with the edited record. • Or click No to cancel the action and resume editing. <p>Results</p> <ul style="list-style-type: none"> • The edited version replaces the previous version of the record and remains set as your default CD.

Use Bibliographic Constant Data

Edit a constant data record

	Action
1	On the Cataloging tab, under Search Options, click Constant Data . The Search Constant Data screen appears.
2	In the text box, type the name and/or My Status text of the constant data record you want to edit. Or To retrieve a list of all your library's constant data records, leave the text boxes empty.
3	Click Search or press <Enter>. The system displays a full record or a list of retrieved records.
4	Single constant data record <ul style="list-style-type: none">On the Edit list, click Edit Constant Data or press <Alt><K> and then <L> (or <Alt><J> and then <L>). Constant data results list <ul style="list-style-type: none">Click the entry number of the constant data record you want to edit. The constant data record appears in an edit view.

	Action
5	<p>Modify the constant data record as appropriate.</p> <ul style="list-style-type: none"> • Insert empty fields or elements via constant data. In the constant data record, include the appropriate MARC tag or DC element label and either type a few characters in the content area or type \$a [BLANK] (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical bar). (Constant data does not retain fields/elements that contain no data.) • Retain empty subfields in variable fields. If variable fields in default constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain empty subfield codes in a variable field in constant data, type the following after each subfield code: [BLANK]. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field. • Protect fixed field elements in records. By default, the fixed field in constant data overwrites the fixed field in a record. You can prevent a specific element in the constant data fixed field from replacing that element in the fixed field of a bibliographic record. In the constant data record, type asterisks (*) in the text box for the element. Type 1 asterisk for each character of the element value. For example, to preserve the value for the Lang element in bibliographic records, type *** in the Lang element of the constant data record.
6	<p>Replace the edited record in the constant data file.</p> <ul style="list-style-type: none"> • On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>). <p>The system asks you to confirm that you want to replace the previous version of the record with the revised version.</p> <ul style="list-style-type: none"> • Click Yes to replace the existing record with the edited record. • Or click No to cancel the action and resume editing. <p>Results</p> <ul style="list-style-type: none"> • The edited version replaces the previous version of the record. • The system does not let you preserve the previous version of the record. <p>Notes</p> <ul style="list-style-type: none"> • You cannot supply a new name for an edited constant data record and then add it to the file as a new record.

Constant data record editing restriction

- While you are editing a constant data record retrieved from your library's constant data file, other users at your library cannot edit the same record.
- Other users can edit the record after you resave the edited record in the constant data file or take the take the Cancel Changes action.

Logoff warning for constant data records

- When you log off, the system checks for records currently in edit mode, including constant data records.
- If you have started editing a constant data record or created a new constant data record but have not added it to the CD file, the system displays a message reminding you to complete editing and replace or add the record(s) before logging off.

Use Bibliographic Constant Data

- To complete your work on the record(s), on the message screen click **Show Active Records** or press <Ctrl><Shift><9>. At the Active Records screen, under Records in Cataloging Constant Data, click a constant data name or a new constant data record listed as **New**.
- To log off and discard unsaved changes to the record(s), on the message screen click **Logoff immediately**.

Resume editing constant data

You can interrupt work on a constant data record (for example, to view other records or change display options) and then resume editing the record.

Action
On the Cataloging tab, under Show Options, click Active Records or press <Ctrl><Shift><9>. On the Active Records screen, under Records in Cataloging Constant Data, click the hyperlinked constant data name of the record you want to work with. Or click New (if editing a newly created constant data record).

5 Use default constant data

About default constant data

- One default constant data record is associated with each Connexion authorization during each session.
- You can set any constant data record saved in the constant data file as your default bibliographic constant data.
- At any time, you can edit your default bibliographic constant data or select another bibliographic constant data record to set as your default CD.
- When you take the **Apply Default CD** action, your default constant data is applied to the record you are editing.
- **Shared authorizations.** All users of a shared authorization share **one** default constant data record. If one edits the default CD record associated with a shared authorization, or selects a different CD record as the default, the change affects all other users of that authorization.

MARC constant data fields applied

- Set the **MARC Fields to Apply** option in your default constant data to specify which fields (fixed, variable, or all) you want applied. Edit your default constant data to set this option: the setting then determines which fields are added to a bibliographic record. You **cannot** change the setting for each bibliographic record when **applying** default constant data; you must set it in the default constant data **before** you apply default constant data to a bibliographic record.
- Depending on the option you select, the system adds the entire record, the fixed field only, or the variable fields only.
 - **Fixed field:** Values of elements in the fixed field (008 and Leader) replace corresponding elements in the record, unless the constant data contains asterisks (*) in place of a value. Or select **Variable Fields Only** to preserve all fixed field values.
 - **Repeatable variable fields** in constant data are added to the bibliographic record. Repeatable fields in constant data **do not replace** corresponding variable fields in the record. Edit the resulting record to combine or delete unwanted repeated variable fields.
 - **Nonrepeatable variable fields** Nonrepeatable fields in constant data **replace** corresponding variable fields in the record.
 - **Empty variable fields:** To retain an **empty** variable field in constant data, In the constant data record, include the appropriate MARC tag or DC element label and either type a few characters in the content area or type **\$a [BLANK]** (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical bar).
 - **Subfields:** If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain **empty** subfield codes in a variable field in constant data, type the following after each subfield code: **[BLANK]**. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field.

- **Format mismatch warning.** If the MARC format of the CD record does not match the format of the bibliographic record, the system displays a warning message. To cancel applying the mismatched CD record, click **Cancel**.

Note: The system does not compare formats if you choose to apply **Variable Fields Only**.

Dublin Core constant data fields applied

- **Whole CD record always applied.** If you are editing a record in Dublin Core Template or Dublin Core Text Area view, you cannot specify which constant data fields to apply. The system always applies the entire CD record.
- Dublin Core elements in constant data are added to the bibliographic record; constant data elements do not replace corresponding elements in the bibliographic record. Edit the resulting record to combine or delete unwanted repeated elements.

Apply default constant data to a bibliographic record

	Action
1	<ul style="list-style-type: none"> • Retrieve a bibliographic record or create a new bibliographic record and begin editing. You must be in edit mode to apply default constant data.
2	<ul style="list-style-type: none"> • On the Edit list, click Apply Default CD or press <Alt><K> and then <C> (or <Alt><J> and then <C>). The system adds the default constant data. • MARC constant data fields applied. Depending on the option you select for MARC Fields to Apply, the system adds the entire record, the fixed field only, or the variable fields only. • Dublin Core elements in constant data are added to the bibliographic record; constant data elements do not replace corresponding elements in the bibliographic record. Edit the resulting record to combine or delete unwanted repeated elements. • Format mismatch warning. If the MARC format of the selected CD record does not match the format of the bibliographic record, the system displays a warning message. To cancel applying the mismatched CD record, click Cancel. Note: The system does not compare formats if you choose to apply Variable Fields Only.
3	Make any other changes you wish to complete the record.
4	<p>Save the record for further processing and/or review.</p> <ul style="list-style-type: none"> • On the Action list, click Save Record to add the record to the bibliographic save file. Assign a status appropriate for the record's position in your workflow. <p>Or</p> <p>Take a final action on the record.</p> <ul style="list-style-type: none"> • New record. On the Action list click Update Holdings or Produce and Update Holdings or Alternate Produce and Update. • Existing record, not locked. On the Action list, click Update Holdings or Produce and Update Holdings or Alternate Produce and Update or Export Record in [MARC or DC HTML or DC RDF]. • Locked master record. On the Action list, click Replace Record or Replace and Update Holdings.

Apply default constant data to multiple bibliographic records

- **Saved records only.** The Apply Default CD to Flagged Records action is available only for records in the bibliographic save file.
- **Maximum of 100 flagged records per action.** If you flag more than 100 records and then take the Apply Default CD action, Connexion applies default constant data to the first 100 flagged records. Then the system asks whether you want to process the remaining flagged records or cancel the action.
- **No format mismatch warning.** The system does not check for MARC format mismatch when you apply default CD to flagged records.

My Status to indicate format. If desired, you can indicate the MARC format in the My Status text in a saved record.

	Action
1	Search the bibliographic save file to retrieve records to which you want to apply default constant data.
2	On the search results screen, flag the records. <ul style="list-style-type: none"> • Flag each record by selecting the check box to the left of the brief entry. Or • On the Action/Sort list, click Flag All on Page or Flag All Records Retrieved.
3	Optional: Combine records flagged in separate search results To apply default CD to records retrieved and flagged in separate searches, use the Flagged SF Records screen. <ol style="list-style-type: none"> 1. Retrieve and flag groups of saved bibliographic records. 2. On the Cataloging tab, under Show Options, click Flagged SF Records. 3. On the Action/Sort list, click Flag All on Page or Flag All Records Retrieved.

	Action
4	<ul style="list-style-type: none"> On the Action/Sort list, click Apply Default CD to Flagged Records. The system adds the default constant data. MARC constant data fields applied. Depending on the option you select for MARC Fields to Apply, the system adds the entire record, the fixed field only, or the variable fields only. Dublin Core elements in constant data are added to the bibliographic record; constant data elements do not replace corresponding elements in the bibliographic record. Edit the resulting record to combine or delete unwanted repeated elements. <p>More than 100 flagged records. If you flag more than 100 records and then take the Apply Default CD action, Connexion applies default constant data to the first 100 flagged records. Then the system asks whether you want to process the remaining flagged records or cancel the action.</p> <ul style="list-style-type: none"> Click Continue to apply default CD to the next 100 flagged records. Or Click Cancel to stop processing flagged records.
5	Edit each record to make other changes needed to complete the content.

Set a bibliographic constant data record as default constant data

	Action
1	<ul style="list-style-type: none"> On the Cataloging tab, under Search Options, click Constant Data. The Search Constant Data screen appears.
2	<p>Find a specific CD record.</p> <ol style="list-style-type: none"> In the search form, type the name and/or the My Status text of the constant data record you want to retrieve. Select the Name index or the My Status index from the index list. <p>List all constant data records</p> <ul style="list-style-type: none"> To retrieve a list of all your bibliographic constant data records, in the search form, leave the text boxes empty.
3	<p>Click Search or press <Enter>.</p> <p>The system displays the bibliographic constant data record(s) that match the query.</p>
4	<p>Single bibliographic constant data record</p> <ul style="list-style-type: none"> On the Edit list, click Set as Default Constant Data or press <Alt><K> and then <G> (or <Alt><J> and then <G>). <p>Bibliographic constant data results list</p> <ul style="list-style-type: none"> Click the Set Default button next to the name of the bibliographic constant data record you want to become your default constant data. <p>The selected default constant data record appears in edit mode.</p>

Apply default constant data to new record

	Action
1	<ul style="list-style-type: none"> On the Cataloging tab, under Create Options, click Single Record. The Create Record screen appears.
2	<ol style="list-style-type: none"> Select the record view you prefer. Select the workform for the type of record you want to create. Or Specify a URL to extract. Select or clear the check boxes for record creation options: check for existing records and (for WebDewey subscribers) assign DDC numbers.
3	<p>Apply default constant data.</p> <ul style="list-style-type: none"> To merge content from your default constant data into the new record, select the check box labeled Apply Default Constant Data. <p>Default setting: check box not selected; the system does not add default constant data.</p> <p>MARC only: Constant data fields to apply</p> <ul style="list-style-type: none"> Depending on the option you selected within the default constant data, the system adds the entire record, the fixed fields only, or the variable fields only. To change the setting for this option, edit your default constant data. On the Cataloging tab, under Show Options, click Default CD.
4	<p>Click Create.</p> <p>Result</p> <ul style="list-style-type: none"> Workform. The system retrieves the selected workform and merges your default constant data. The resulting bibliographic record appears in the editing view you selected (MARC or MARC Text Area or Dublin Core or DC Text Area). Fields in the new record contain default values from the workform and/or content from default constant data. Extract from URL. The system locates the resource, extracts information, and merges your default constant data. The resulting record appears in the edit view you selected. Fields in the new record contain extracted content, content from constant data, or generated content (Dewey numbers).
5	<p>Make any other changes you wish to complete the record.</p>
6	<p>Save the record for further processing and/or review.</p> <ul style="list-style-type: none"> On the Action list, click Save Record to add the record to the bibliographic save file. Assign a status appropriate for the record's position in your workflow. <p>Or</p> <p>Add the new record to WorldCat.</p> <ul style="list-style-type: none"> On the Action list click Update Holdings or Produce and Update Holdings or Alternate Produce and Update.

6 Find constant data records

Why search for constant data records?

- Retrieve a constant data record to use as your default constant data.
- Review constant data records created by users at your library.
- Find a constant data record you want to edit.
- Find a constant data record you want to delete.

Find specific constant data records

	Action
1	On the Cataloging tab, under Search Options, click Constant Data . The Search Constant Data screen appears.
2	<p>In the search form</p> <ol style="list-style-type: none"> 1. Type the name and/or the My Status text of the constant data record you want to retrieve. 2. Select the Name index or the My Status index from the index list. Type one or more word(s) of the constant data name or the My Status text. <ul style="list-style-type: none"> • Use truncation to include variant endings for a constant data name. Or use truncation when you know only the first part of the name. Type the first characters of the name (include at least 2 characters); then type an asterisk (*). Examples: dc*, image*, digi* • Use character masking (wildcards) to expand a term to include variant spellings or when you are unsure of the correct spelling for part of a term. Type a question mark (?) or a number sign (#) in place of the character(s) you want to mask. Use the question mark to retrieve variants of 0 or more characters. Examples: col?r retrieves <i>color</i> or <i>colour</i>; int?net retrieves <i>internet</i> or <i>intranet</i>. Use the number sign to retrieve variants of exactly 1 character. Example: wom#n retrieves both <i>woman</i> and <i>women</i>. <p>To retrieve a single record, include the complete name.</p>
3	<p>Check the search form for errors.</p> <p>Clear search</p> <ul style="list-style-type: none"> • To clear the text boxes, click Clear Search. • Index lists retain the last index you selected. • The operator list retains the last operator you selected. • The Retain Search check box retains its setting (selected or cleared).
4	<p>Click Search or press <Enter>.</p> <p>The system displays the constant data record(s) that match the query.</p> <p>Retain search</p> <ul style="list-style-type: none"> • To preserve search terms you typed in the text boxes, select the Retain Search check box. • If Retain Search is not selected (the default setting), the system clears the text boxes.

Use Bibliographic Constant Data

Stopwords

Omit the following words from a constant data search. If you include them, the system removes them before processing the query. If a query contains only stopwords, no records are retrieved.

Stopword list: a an and are as at be by for from in is of on or that the to with http www

Search for singular or plural

- To search for either the singular or the plural form of a word in a constant data name or My Status, type both singular and plural forms in the text box and type **or** between the terms. **Examples: serial or serials; catalog or catalogs.**
- Enter the precise word(s) you want to retrieve. The system does **not** automatically search for the singular form of a word when you enter only the plural form.

List all your library's constant data records

	Action
1	On the Cataloging tab, under Search Options, click Constant Data . The Search Constant Data screen appears.
2	In the search form, leave the text boxes empty.
3	Click Search or press <Enter>. The system displays a list of your library's constant data records.

Search history: view and use previous searches

- Use the Search History window to
 - View your previous 10 constant data searches.
 - Repeat a previous search.
 - Revise a previous search.
- Previous searches are associated with your authorization number and are retained between Connexion sessions. The search history is not cleared when you log off.

Search History function	How to use
Open Search History window	At the Search Constant Data screen, <ul style="list-style-type: none"> • Click Search History or press <Alt><=>.
List of previous searches	For each listed search, the window shows <ul style="list-style-type: none"> • Search type: Bibliographic Constant Data. • Timestamp: date and time the search was performed. • Search criteria: terms, indexes, and operators.
Repeat a previous search	<ul style="list-style-type: none"> • Click Repeat. Connexion immediately performs the selected search.

Search History function	How to use
Revise a previous search	<ul style="list-style-type: none">• Click Revise. Results• Connexion displays the Search Constant Data screen. The selected search is ready for revision.
Clear search history	<ul style="list-style-type: none">• Click Clear History (at the top of the Search History window).
Close the Search History window	<ul style="list-style-type: none">• Click Close (at the top of the Search History window).

7 Use constant data search results

Results display

Number of Records Found	Results Display
No records found	The system displays the following message at the top of the Search Constant Data screen: No Records Found for your Search Please change or simplify your search and try again. The search entry form retains the search term(s) you used.
1 record found	The system displays the full constant data record.
Up to 10 records	The system displays the message: [number] records found searching for [search query] in Constant Data <ul style="list-style-type: none"> • The results screen lists the constant data names of all retrieved records, beginning with the record most recently added to the constant data file.
11 or more records	The system displays the message: [number] records found searching for [search query] in Constant Data <ul style="list-style-type: none"> • The results screen lists constant data names for the first 10 retrieved records, beginning with the record most recently added to the constant data file. • The View List box lets you type an entry number to display 10 entries beginning with that number. The left and right arrow buttons let you move forward or back 10 entries. The View Record box lets you type an entry number to view the full record.

Query display

At the top of the first screen of results, the system displays a message that includes the number of records retrieved and the query that produced the results. The message provides feedback that lets you see how the system interpreted your search criteria. The display shows:

- Your institution symbol as the first term in any query. Constant data searches retrieve records for your library **only**. **Example:** in: (OCL)
- The word(s) of the constant data name you typed in the search form, preceded by the index label (nm:) for the constant data name index. **Example:** in: (OCL) and nm: ("test")

Use this displayed query to

- Diagnose causes for unsatisfactory search results.
- Refine your search to improve results.

Use Bibliographic Constant Data

Check name of default constant data record

Action	
At the top of each screen of search results, the system displays the label Default Constant Data Record , followed by the constant data name of the record currently set as your default constant data.	

Sort constant data results (<500 records)

Action	
1	Scroll to the top of any screen of search results.
2	On the Action/Sort list, click Sort by Constant Data Name .

Move through list (View List and View Record jump bar)

- The **View List** jump bar appears at the top and bottom of each screen of the results list.
- The **View Record** jump bar appears at the top and bottom of each screen of the results list.

Action	How to
Move forward 10 entries	Click the right arrow button (right of View List box).
Move back 10 entries	Click the left arrow button (left of View List box).
View 10 entries beginning with specific entry	Type an entry number in the View List box and press <Enter>.
View a specific record	Click the hyperlinked entry number for the record you want to view. Or Type an entry number in the View Record box and press <Enter>.

Move between records (View Record jump bar)

- The **View Record** jump bar appears at the top and bottom of each record screen.
- The record position indicator (**Record _ of _**) appears at the top and bottom of each record screen. As you move through the records, the indicator changes to reflect your current position in the results list.

Action	How to
View next record in list	Click the right arrow button (right of View Record box).
View previous record in list	Click the left arrow button (left of View Record box).
View a specific record	Type an entry number in the View Record box and press <Enter>.

Use Bibliographic Constant Data

Action	How to
Return to search results	Click the Search Results button at the top or bottom of the record screen. Or On the Cataloging tab, under Search Options, Constant Data, click Search Results .

Actions on list of CD records)

- **Delete Flagged Records.** Connexion can delete more than 100 CD records at a time, in groups of 100. After processing 100 records, the system asks you to confirm that you want to continue.

Action	Result
Sort By Constant Data Name	The system sorts the list alphabetically by constant data name.
Flag All on Page	A check mark appears in the box to the left of each entry on this page of the result set.
Flag All Records Retrieved	Flag all records in the result set.
Clear Flags on Page	Check marks removed from all entries on this page of the results list.
Clear All flags	Check marks removed from all entries on all pages of the results list.
Delete Flagged Records	The flagged records are removed from your library's constant data file.

View or edit CD record from brief list

Action
<p>View record in edit mode.</p> <ul style="list-style-type: none"> • Click the hyperlinked entry number of the constant data record you want to edit. Or • Type an entry number in the View Record box and press <Enter>. <p>View record in display mode.</p> <p>Click the Display button in front of the entry for the record you want to view.</p>

Show or hide record viewing buttons

- Record viewing buttons are hidden by default. Press <Alt><Y> to show the buttons to the left of each entry.
- Click the **Display** button to view a record in display mode (read-only).

Action
Press <Alt><Y> to insert a Display button to the left of each brief entry. To hide the buttons, press <Alt><Y> again.

Use Bibliographic Constant Data

Use constant data record as default constant data

Action	
CD search results	
<ul style="list-style-type: none"> Click the Set Default button in front of the constant data record you want to use as default constant data. 	
Or	
CD record	
<ul style="list-style-type: none"> On the Edit list click Set as Default Constant Data or press <Alt><K> and then <G> (or <Alt><J> and then <G>). 	

Delete single constant data record

Action	
1	On the results screen, click the entry number or click the Display button for the constant data record you want to delete.
2	On the Action list, click Delete Constant Data Record or press <Alt><K> and then <X> (or <Alt><J> and then <X>). <ul style="list-style-type: none"> Click OK to confirm that you want to delete the record. Or <ul style="list-style-type: none"> Click Cancel to keep the record in the constant data file.

Delete multiple constant data records

Action	
1	On the results list, flag the CD records you want to delete <ul style="list-style-type: none"> Click the check box for each constant data record you want to delete. Or <ul style="list-style-type: none"> On the Action/Sort list click Flag All on Page or Flag All Records Retrieved.
2	(Optional) Retrieve all flagged CD records. If you flagged CD records for deletion that are not in the current results list, view a screen that lists all CD records flagged during your current session. On the Cataloging tab, under Show Options, click Flagged CD Records .
3	At the CD Search Results screen or the Flagged CD Records screen, On the Action/Sort list, click Delete Flagged Records . <ul style="list-style-type: none"> Click OK to confirm that you want to delete the records. Or <ul style="list-style-type: none"> Click Cancel to keep the records in the constant data file.

Print screens of constant data results list

Action	
1	If the list includes multiple screens, jump to the screen you want to print.
2	Click once in the frame that contains the record list.
3	In your browser, on the File menu, click Print or on the toolbar click the Print button.
4	In the Print dialog box, click OK or press <Enter>.