

## Use Institution Records

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

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<b>Date</b>	<b>Section title</b>	<b>Description of changes</b>
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6565 Frantz Road  
Dublin, OH 43017-3395 USA

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## 1 About institution records

### RLG cluster record concept as implemented for WorldCat

Bibliographic institution records (IRs) in WorldCat are the result of incorporating bibliographic "cluster" records from the RLG Union Catalog into WorldCat during the integration of RLG into OCLC.

#### Differences between WorldCat and the RLG Union Catalog

- WorldCat stores a single **master** bibliographic record for a library item. OCLC cataloging members can modify the record with local information for use in their own library catalogs without changing the integrity of the master record.
- The RLG Union Catalog stored every bibliographic record contributed by individual source institutions for the same item in a **cluster**.
- One record in a cluster was designated a **primary cluster member** (PCM) because it represented a **best** record, based on characteristics such as cataloging source, level or fullness of cataloging, and presence of non-Latin scripts.
- All other records in the cluster were designated **secondary cluster members** (SCM).

#### Integration of RLG Union Catalog records into WorldCat

1. Primary cluster records were compared to WorldCat master records.
2. If a match was found, data from the PCM that would enhance the master record was merged into the WorldCat master record.
3. If no match was found, any local data was removed from the PCM, and a WorldCat master record was created based on data in the PCM.
4. If no match was found for a single cluster record (PCM by default), and the contributing institution wanted IRs, a new master record was created based on the PCM, and the PCM was attached and retained as an institution record.
5. For libraries that requested continued access to their IR, all members of a cluster, PCM and SCMs, were added to WorldCat as institution records and were **attached** to the master record.

**Note:** Most PCMs were added to WorldCat. SCMs were loaded as institution records if requested by the owning library.

#### Identifying numbers

- Like bibliographic master records, bibliographic institution records are assigned unique OCLC control numbers in WorldCat. A new index (ir:) is available to search specifically for IR OCLC numbers.

- The master record to which institution records correspond is identified in the IR by the master record OCLC number, which the system supplies in field 079 subfield a.

### Purpose of institution records

- These records contain additional cataloging data, such as local call numbers, holdings locations within the institution, or local or copy-specific notes.
- Other OCLC member catalogers besides the source institution that contributed the record have access to the additional data.
- If your OCLC cataloging profile (determined by your logon authorization) includes institution records, you can create, add, delete, move and take other actions on your own institution records. Otherwise, you have read-only access to institution records of other libraries.
- All other OCLC member catalogers have read-only access to all institution records.
- With read-only access, you can retrieve, copy and paste, export, or print institution records. You can also derive bibliographic master records or bibliographic constant data records from IRs.

### Who can use institution records?

### Check your authorization for IR-related capabilities

To add IR capabilities to your authorization, contact your regional service provider.

Action
On the General tab, on the Admin Options list, click <b>User Information</b> . On the User Information screen, check the setting for <b>Profiled for Institution Records?</b> <b>Yes</b> indicates you can create, edit, and take actions on your library's institution records. If the item is not shown, you have read-only access to institution records.

### Access to institution records

- All institution records are attached to master records. Anyone can access IRs through master records you retrieve using WorldCat searches.
- At this time, you cannot search directly for IRs. If you have an option set, your WorldCat searches will be matched against both master records and IRs, but the search retrieves only the master records, from which you can navigate to the IRs.

Does the master record have IRs attached?

View	IR indicators
Master bibliographic record	<p>Record information area. When you open a record with attached IRs from WorldCat or the bibliographic save file, information about the IRs appears at the top of the record, along with local holdings information.</p> <p><b>Example:</b>                      OCLC 16 - ZMY Holdings/IR/LHR - 37 other holdings; 34 other IRs                      The information indicates that:                      Institution ZMY has contributed IR record(s) for this master record and also has local holdings record(s) (LHRs), attached.                      34 more IRs contributed by other libraries are attached and there are 37 additional holdings on the master record.</p>
WorldCat brief list	<p>Each brief entry shows:                      The code <b>IR</b> (left of record number), if your library contributed attached institution record(s)                      At the end of the brief entry, the number of attached IRs contributed by other libraries  <b>Example:</b>  <b>IR</b> (left column) and <b>Other IRs, 18</b> (end of entry). These indicators show that you have IR(s) attached and that 18 more IRs, contributed by other libraries, are attached.  <b>Access attached IRs.</b>                      Click the hyperlinked <b>IR</b> code to view a list of your IRs.                      Click <b>Other IRs</b> to view a list of all attached IRs.</p>
WorldCat truncated list	<p>Each truncated entry shows:                      The code <b>IR</b> in the Record column, if your library contributed attached institution record(s)  <b>Access attached IRs.</b>                      Click the hyperlinked <b>IR</b> code to view a list of your IRs.</p>
Bibliographic Save File	<p>Bibliographic save lists do not display either holdings information or institution record information.</p>

## 2 Find institution records in WorldCat

### About searching for institution records (IRs)

- **WorldCat searches do not retrieve IRs directly.** You cannot search for IRs directly and retrieve a list of IRs.
  - WorldCat search results always display only master records retrieved.
  - IRs are accessible only from the master records to which they are attached.
- **Search both master records and institution records.** All existing WorldCat indexes apply to IRs as well as to master records if you set the **Include Indexes** option **WorldCat and Institution Record**, Connexion searches IRs as well as master records. When you choose to include IR indexes, you can search for data in four new IR-specific indexes and new fields/subfields added to existing indexes specifically to help retrieve master records by searching for unique data in attached IRs. If you keep **Include Indexes** set to the default, **WorldCat**, Connexion searches master records only. (See the comprehensive *Searching WorldCat Indexes* document.)

**Caution.** If you select the option to include IR-specific indexes, you may retrieve master records because of data that occurs only in attached IRs. Because search results do not display IRs, it will not be obvious why the master record was retrieved until you display the IR.

**Example.** If you search for the OCLC control number of an institution record using the new **IR Control Number (ir:)** index, the master record to which the IR is attached appears in search results. To see the IR control number, you must view the IR from the master record.

- **Access institution records from master records.**
  - In the master record, on the View list, select **Show Institution Records** and then select **All Institution Records** to show all attached IRs.
  - Or select **By Specific Symbol** and then specify an OCLC symbol to show IRs contributed by that institution. You can enter your own OCLC symbol (if you use IRs) or a symbol for any other library.
  - To view IRs you contributed when your search retrieves a single master record, select the **Show Institution Record if Single Record Found** option.

### Use WorldCat search options to facilitate retrieval of IRs

- If you use institution records, the Search WorldCat screen provides two options to assist you:
  - The **Include Indexes** option lets you choose to search for data in indexed fields in master records only, or to search for data in indexed fields in IRs and/or in master records, including data that occurs only in IR fields that are indexed in IR-specific indexes.
  - The **Show if Single Record Found** option lets you choose to display your library's attached IR(s), rather than the master bibliographic record, when your search retrieves a single bibliographic record.
  - The options appear below the command line and guided search entry boxes. The **Include Indexes** option is on the same line, to the right of the **Show if Single Record Found** option.

### Include IR-specific indexes for WorldCat searches

- To facilitate retrieval of unique data in institution records, set an option to include IR-specific indexes in WorldCat searches.
- With the (**WorldCat and IR**) setting selected, you can search for terms in IR fields included only in an IR-specific index.
- With the default choice (**WorldCat**) selected, Connexion does not search terms in institution records or use IR-specific indexes. Only data in master record that is indexed in standard WorldCat indexes is retrieved.
- Regardless of the setting for this option, only master records are displayed in search results; You can view attached IRs from list entries or from the master record.

	<b>Action</b>
1	Enter your search in either the command line or the guided search area.
2	Find the Include Indexes option (right of the Show if Single Record Found option, below both command line and guided entry search areas) Select <b>WorldCat and IR</b> . <b>Default</b> WorldCat. Only standard WorldCat indexes are searched.
3	Click <b>Search</b> .
4	<p><b>Results</b></p> <p><b>WorldCat and IR selected</b></p> <ul style="list-style-type: none"> <li>• Connexion searches both master records and institution records, using both standard indexes and institution record indexes.</li> <li>• Both master records and institution records are searchable using all WorldCat indexes, including indexes that target unique data in IRs. However, master records rarely contain fields/subfields included in IR-specific indexes.</li> <li>• Search results list only master records retrieved by the search <ul style="list-style-type: none"> <li>— Master records with attached IRs for your library have an <b>IR</b> link next to the record number. Click <b>IR</b> to view your institution record(s).</li> <li>— In brief list entries, records with attached IRs have links to <b>Other IRs</b> that display a list of IRs contributed by other libraries.</li> <li>— Or, open a master record to access attached IRs.</li> </ul> </li> <li>• With IR-specific indexes included, master records may be retrieved because of unique data in attached IRs that is not present in the master record.</li> </ul> <p><b>WorldCat selected</b></p> <ul style="list-style-type: none"> <li>• Connexion does not search institution records or IR-specific indexes. You can search for terms in all standard WorldCat indexes.</li> <li>• Any attached IRs are accessible from retrieved master records.</li> </ul>

**IR-specific indexes: details.** If you include IR-specific indexes, you can search for data in four new WorldCat indexes, listed in the following table. (See the comprehensive *Searching WorldCat Indexes* document for complete information on these indexes, on new fields/subfields added to existing WorldCat indexes to index unique data in IRs, and related indexing changes)

Index Name	Index label	Indexed fields	Notes
Action note	io:	583 a c h i l 2 3 5	Indexes master records and IRs <b>Note:</b> Action note is the <b>only</b> IR-specific index that is available for browsing WorldCat.
General call number	nu: nu=	852 h i j	Indexes master records and IRs. However, 852 fields do not appear in master records.
OCLC control number assigned to IR	ir:	001	Indexes IRs only
System control number	sy:	035 a	Indexes IRs only Omit parentheses in numbers <b>Example:</b> To search for: (CStRLIN)OHLG32495957-S Type: <b>CStRLINOH LG32495957-S</b>

**Show your IRs when you retrieve a single master record**

- To go directly to your library’s institution record(s) when you retrieve a single master bibliographic record (rather than to the master record), select **Institution Record** from the **Show if Single Record Found** list. Choosing this setting has the following effects:
  - Single master bibliographic record.** Connexion displays a single institution record or a list of all IRs contributed by your institution.
  - Two or more master bibliographic records.** Connexion displays a brief list of a truncated list of master records. Whether or not you select the option, for records with your IRs attached, list entries include **IR** links that display your IRs.

	Action
1	Enter your search in either the command line or the guided search area.
2	Select <b>Institution Record</b> from the <b>Show if Single Record Found</b> list. <b>Default Bibliographic Record</b> selected.

	<b>Action</b>
3	Click <b>Search</b> .
4	<p><b>Result</b></p> <p><b>Single master record with your IRs attached</b></p> <ul style="list-style-type: none"> <li>• Either an institution record or an institution record list (for multiple IRs) for your institution.</li> </ul> <p><b>Multiple master records</b></p> <ul style="list-style-type: none"> <li>• WorldCat truncated list or brief list of master records.</li> <li>• Master records with attached IRs for your library have an IR link next to the record number. Click IR to view your institution record(s).</li> <li>• Or, open a master record to access attached IRs.</li> </ul>

View your library's attached IRs, IRs for another institution, or all IRs attached to the master record.

**Show your library's attached IRs from master record**

	<b>Action</b>
1	Open the master bibliographic record for which you want to show your attached institution records.
2	<p><b>From the master record</b></p> <p>On the Action list, click <b>Show My Institution Records</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;;&gt; (semicolon) (or &lt;Alt&gt;&lt;J&gt;, &lt;;&gt;).</p> <p><b>Results</b></p> <p>Depending on how many IRs you have contributed for this master record, Connexion displays a single IR or a list of all your IRs.</p>

**View IRs for another library or all IRs**

	<b>Action</b>
1	Open the master bibliographic record for which you want to view institution records.
2	<p><b>From the master record</b></p> <p>On the View list, click <b>Display Institution Records</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;}&gt; (right brace) (or &lt;Alt&gt;&lt;J&gt;, &lt;}&gt;).</p>
3	<p>In the <b>Institution Records type</b> list, select:</p> <p><b>All Institution Records.</b></p> <p>Or</p> <p><b>By Specific Symbol.</b> Then type the institution symbol in the text box</p>
4	<p>Click <b>Display Institution Records.</b></p> <p><b>Results</b></p> <p>Depending on the option you specified, Connexion displays a list of institution records for one institution or IRs for all institutions.</p>

Institution records and WorldCat search results

**If you do not use IRs:**

- WorldCat search results are unchanged. **Note:** You will see indicators of attached IRs in search results and in master records.

- Institution records attached to master records are accessible to all catalogers with at least a Full-level authorization. If your library does not contribute or use IRs, you have read-only access to IRs contributed by others.
- With read-only access, you can do the following: print an IR, copy text from an IR for use in a record you are editing; export an IR; or derive a new master record or constant data record from an IR.

**If you use IRs:**

- Browsing WorldCat does not include IR-specific indexes, even if you select the option to include IR indexes for searching. However, attached IRs are accessible from master records you display from browse result.
- You cannot save IRs directly. However, you can save master records with IRs attached and access attached records you open from the bibliographic save file.

**Appearance and content of institution records**

- **Record header.** Identifies the record as an IR, shows the OCLC symbol of the contributing library, and gives information from field 245.

**Example:**

Institution Record ZMY: Remarks by former President Harry S. Truman . . .

- **Edit view or display (read-only) view.**  
If your authorization includes full capabilities for using institution records, IRs contributed by your library open in an edit view. Other libraries' IRs open in display view; record content is read-only. In display view, you cannot edit or take actions. You can do the following: print an IR, copy text from an IR for use in a record you are editing; export an IR; or derive a new master record or constant data record from an IR
- **Identifying numbers in institution records:**
  - **Institution record OCLC#.** In field 001, IRs contain the OCLC control number assigned to the IR when it was added to WorldCat.
  - **Master record OCLC#.** In field 079, IRs contain the OCLC control number assigned to the master record to which the IR is attached. If the master record contains field 019, which stores OCLC control numbers of merged records, these control numbers appear in \$z of field 079 in the IR.

**Appearance and content of IR results lists**

- **List header** identifies this as a list of institution records.
- Master record content (grey box above the list columns) shows information from selected fields in the master record: 1xx (personal, corporate, or conference name), 245 (title), 260 (publisher, place, and date), 300 (physical description), and 001 (OCLC control number).

Column	Description	Possible values
1: Record	Sequential number	Sequential number
2: Inst	OCLC institution symbol	OCLC institution symbol. To see the name of the institution, hover the mouse pointer over the symbol.

Column	Description	Possible values	
3: Enc Level	Encoding level from Leader/17	<b>Content</b> Full Full, not ex. Less-than-full Abbreviated Core Partial Minimal Prepub Full, OCLC member Less-than- full, OCLC member Full, batch Less-than- full, batch Validation error, batch Deleted Record Other	<b>Leader 17 =</b> Blank 1 2 3 4 5 7 8 I K L M E J None of the above
4: Class Scheme	Presence of a classification field; displays all schemes, comma-separated. To see call number field(s), hover the mouse over the text.	<b>Field present</b> 050 060 070 080 082 084 086 090 092 096 098 099	<b>Column contains</b> LCC NLM NAL UDC DDC Other GovDoc Local LCC Local DDC Local NLM Local Other Local Free Text
5: Scripts	Presence of 066 subfield \$c <b>Note:</b> Field 066 is not displayed in Connexion browser. Record identification area contains the notation <b>Non-Latin script suppressed</b>	<b>Value in 066 c</b> \$1 (3 or (4 (N or (Q (S Anything else	<b>Column contains</b> CJK Arabic Cyrillic Greek Code in \$c, such as Beng, Deva, Tamil, or Thai.
6: Contents, Summary	Presence of Contents note (505) or Summary (520) To see the text in 505 or 520, hover the mouse pointer over the text in the column.	If 505 is present, column contains <b>Contents</b> If 520 is present, column contains <b>Summary</b>	

Column	Description	Possible values
7: Authen Code	Authen. Code in 042; displays all, codes, comma-separated	For a list of all codes, see <i>OCLC Bibliographic Formats and Standards</i>
8: Replaced	Most recent replaced date, from field 005, bytes 00 -- 07	Date in the format YYYYMMDD
9: Other	Various types of information, if present in the record	<p>Archival Control if Type of Control = a  <b>Types of microform generation(s)</b>, from 007/11. Shows one of the following if code is present:                      Master microform (if 007/11 = a)                      Printing master microform (if 007/11 = b)                      Service copy microform (if 007/11 = c)                      Mixed generation microform (if 007/11 = m)</p> <p><b>Reformatting quality for digitized materials</b> from electronic resources, from 007/13. Displays one of the following if present:                      Access (if 007/13 = a)                      Preservation (if 007/13 = p)                      Replacement (if 007/13 = r)</p> <p><b>Language of cataloging</b> Non-English language of cataloging (MARC language code) from 040 subfield b, if present.</p> <p><b>URI for Electronic Access</b>, if \$u is present in field: 505, 506, 514, 520, 530, 538, 540, 545, 555, 563, 583, or 856</p> <p><b>Action</b> followed by code in 583 \$a, if present</p>

### 3 Institution record search results list

**About institution record results**

- Lists institution records for one institution or for all institutions that have at least one institution record (IR) linked to a single bibliographic record.
- Presents brief data from each institution record.
- The system displays this list whenever you have two or more institution records:
  - Your WorldCat search retrieves a single bibliographic record and you select the option to **Show Institution Records If Single Record Found**.
  - You click an **IR** link in a WorldCat truncated list or brief list
  - You take the Display Institution Records action from the View list in a master record and either select **All Institution Records** or select **By Specific Symbol** and then specify the OCLC symbol for a single institution that has two or more IRs attached to the master record..

**IR results: screen content**

Element	Description
Navigation bar: Search button Search Options list	Click the <b>Search</b> button (or press <Ctrl><Shift><W>) to return to the Search WorldCat screen. On the Search Options list, click <b>Search Results</b> to go to WorldCat brief or truncated list. On the Search Options list, click <b>IR Search Results</b> to go to the list of institution records. <b>Note:</b> When you view an institution record, the Jump Bar contains an <b>IR Results</b> button. Click <b>IR Results</b> to go to back to the list from which you opened the record.
Search results message	Appears on the top line of the screen. Shows the institution record search query that retrieved the list of IRs. If your results are unexpected, you can use this feedback to verify that you entered the search correctly.
Jump bar (Navigation tools, at top and bottom of the screen)	<b>View Record</b> box The box shows the entry number of the first entry on the screen. Box is active when the screen is first displayed; press <Enter> to view the first entry. To view another entry, type the number in the box and press <Enter>. <b>View List</b> box and arrow buttons Use to move through multiple -screens. To view a section of the list beginning with a specific entry, type the entry number in the box and press <Enter>. To move to the next or previous screen , click the <b>right arrow button</b> or the <b>left arrow button</b> next to the <b>View List</b> box. <b>Note:</b> If all entries appear on a single screen, the View List box and arrow buttons are not active. <b>Bib Record</b> button Click <b>Bib Record</b> to view the master bibliographic record to which the listed institutions records are linked.

**Appearance and content of IR results lists**

- **List header** identifies this as a list of institution records.
- Master record content (grey box above the list columns) shows information from selected fields in the master record: 1xx (personal, corporate, or conference name), 245 (title), 260 (publisher, place, and date), 300 (physical description), and 001 (OCLC control number).

Column	Description	Possible values																																
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2: Inst	OCLC institution symbol	OCLC institution symbol. To see the name of the institution, hover the mouse pointer over the symbol.																																
3: Enc Level	Encoding level from Leader/17	<table border="0"> <thead> <tr> <th>Content</th> <th>Leader 17 =</th> </tr> </thead> <tbody> <tr> <td>Full</td> <td>Blank</td> </tr> <tr> <td>Full, not ex.</td> <td>1</td> </tr> <tr> <td>Less-than-full</td> <td>2</td> </tr> <tr> <td>Abbreviated</td> <td>3</td> </tr> <tr> <td>Core</td> <td>4</td> </tr> <tr> <td>Partial</td> <td>5</td> </tr> <tr> <td>Minimal</td> <td>7</td> </tr> <tr> <td>Prepub</td> <td>8</td> </tr> <tr> <td>Full, OCLC member</td> <td>I</td> </tr> <tr> <td>Less-than- full, OCLC member</td> <td>K</td> </tr> <tr> <td>Full, batch</td> <td>L</td> </tr> <tr> <td>Less-than- full, batch</td> <td>M</td> </tr> <tr> <td>Validation error, batch</td> <td>E</td> </tr> <tr> <td>Deleted Record</td> <td>J</td> </tr> <tr> <td>Other</td> <td>None of the above</td> </tr> </tbody> </table>	Content	Leader 17 =	Full	Blank	Full, not ex.	1	Less-than-full	2	Abbreviated	3	Core	4	Partial	5	Minimal	7	Prepub	8	Full, OCLC member	I	Less-than- full, OCLC member	K	Full, batch	L	Less-than- full, batch	M	Validation error, batch	E	Deleted Record	J	Other	None of the above
Content	Leader 17 =																																	
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Full, OCLC member	I																																	
Less-than- full, OCLC member	K																																	
Full, batch	L																																	
Less-than- full, batch	M																																	
Validation error, batch	E																																	
Deleted Record	J																																	
Other	None of the above																																	
4: Class Scheme	Presence of a classification field; displays all schemes, comma-separated. To see call number field(s), hover the mouse over the text.	<table border="0"> <thead> <tr> <th>Field present</th> <th>Column contains</th> </tr> </thead> <tbody> <tr> <td>050</td> <td>LCC</td> </tr> <tr> <td>060</td> <td>NLM</td> </tr> <tr> <td>070</td> <td>NAL</td> </tr> <tr> <td>080</td> <td>UDC</td> </tr> <tr> <td>082</td> <td>DDC</td> </tr> <tr> <td>084</td> <td>Other</td> </tr> <tr> <td>086</td> <td>GovDoc</td> </tr> <tr> <td>090</td> <td>Local LCC</td> </tr> <tr> <td>092</td> <td>Local DDC</td> </tr> <tr> <td>096</td> <td>Local NLM</td> </tr> <tr> <td>098</td> <td>Local Other</td> </tr> <tr> <td>099</td> <td>Local Free Text</td> </tr> </tbody> </table>	Field present	Column contains	050	LCC	060	NLM	070	NAL	080	UDC	082	DDC	084	Other	086	GovDoc	090	Local LCC	092	Local DDC	096	Local NLM	098	Local Other	099	Local Free Text						
Field present	Column contains																																	
050	LCC																																	
060	NLM																																	
070	NAL																																	
080	UDC																																	
082	DDC																																	
084	Other																																	
086	GovDoc																																	
090	Local LCC																																	
092	Local DDC																																	
096	Local NLM																																	
098	Local Other																																	
099	Local Free Text																																	

Column	Description	Possible values
5: Scripts	Presence of 066 subfield \$c <b>Note:</b> Field 066 is not displayed in Connexion browser. Record identification area contains the notation <b>Non-Latin script suppressed</b>	<b>Value in 066 c</b> \$1 (3 or (4 (N or (Q (S Anything else <b>Column contains</b> CJK Arabic Cyrillic Greek Code in \$c, such as Beng, Deva, Tamil, or Thai.
6: Contents, Summary	Presence of Contents note (505) or Summary (520) To see the text in 505 or 520, hover the mouse pointer over the text in the column.	If 505 is present, column contains <b>Contents</b> If 520 is present, column contains <b>Summary</b>
7: Authen Code	Authen. Code in 042; displays all, codes, comma-separated	For a list of all codes, see <i>OCLC Bibliographic Formats and Standards</i>
8: Replaced	Most recent replaced date, from field 005, bytes 00 -- 07	Date in the format YYYYMMDD
9: Other	Various types of information, if present in the record	Archival Control if Type of Control = a Types of microform generation(s), from 007/11. Shows one of the following if code is present: Master microform (if 007/11 = a) Printing master microform (if 007/11 = b) Service copy microform (if 007/11 = c) Mixed generation microform (if 007/11 = m) <b>Reformatting quality for digitized materials</b> from electronic resources, from 007/13. Displays one of the following if present: Access (if 007/13 = a) Preservation (if 007/13 = p) Replacement (if 007/13 = r) <b>Language of cataloging</b> Non-English language of cataloging (MARC language code) from 040 subfield b, if present. <b>URI for Electronic Access</b> , if \$u is present in field: 505, 506, 514, 520, 530, 538, 540, 545, 555, 563, 583, or 856 <b>Action</b> followed by code in 583 \$a, if present

**Move within IR results screen**

Move to	Procedure
Top or bottom of the screen	Press <PageDown> or <PageUp>. Or Click the down arrow or the up arrow (right end of the blue bar at the top and bottom of the list).
Next or previous screen of list	Use the <b>View List</b> box and arrow buttons to move through a multi-screen Group Summary. To view a section of the list beginning with a specific entry, type the entry number in the box and press <Enter>. To move to the next or previous screen of the Group Summary, click the <b>right arrow button</b> or the <b>left arrow button</b> next to the <b>View List</b> box.
Master record to which institution records are linked	Click the <b>Bib Record</b> button.
Institution IR or list of IRs	Click the hyperlinked entry number for the institution. Or Type an entry number in the <b>View Record</b> box and press <Enter>.

**Appearance and content of institution records**

- **Record header.** Identifies the record as an IR, shows the OCLC symbol of the contributing library, and gives information from field 245.  
**Example:**  
 Institution Record ZMY: Remarks by former President Harry S. Truman . . .
- **Edit view or display (read-only) view.**  
 If your authorization includes full capabilities for using institution records, IRs contributed by your library open in an edit view. Other libraries' IRs open in display view; record content is read-only. In display view, you cannot edit or take actions. You can do the following: print an IR, copy text from an IR for use in a record you are editing; export an IR; or derive a new master record or constant data record from an IR
- **Identifying numbers in institution records:**
  - **Institution record OCLC#.** In field 001, IRs contain the OCLC control number assigned to the IR when it was added to WorldCat.
  - **Master record OCLC#.** In field 079, IRs contain the OCLC control number assigned to the master record to which the IR is attached. If the master record contains field 019, which stores OCLC control numbers of merged records, these control numbers appear in \$z of field 079 in the IR.

## 4 Create and add institution records

### Institution record authorization required

- To create and add institution records, your logon authorization must be associated with a cataloging profile that includes IR-specific capabilities,
- You must be logged on to Connexion with at least a Full-level authorization.
- To add IR capabilities to your authorization, contact you regional service provider.

### Two ways to create and add institution records

- Create and add an institution record with a final action on the master record. Authorized users can take the actions **Alternate Produce and Add IR**, **Produce and Add IR**, or **Update and Add IR**.
- Create an institution record by deriving an IR from a master record or from another institution record. Then add the new IR to WorldCat.
- Connexion does not provide a workform for institution records.

### Add institution record with a final action on the master record

The following final actions on a master record automatically create an IR based on the master record and attach the IR to the master record.

- Alternate Produce and Add IR or press <Alt><K>, <O> (letter O)
- Produce and Add IR or press <Alt><K>, </> (slash)
- Update and Add IR or press <Alt><K><{> (left brace)

	Action
1	Retrieve the master record to which you want to add an IR. Edit the master record as needed.
2	<p>On the Action list take one of these final actions:</p> <ul style="list-style-type: none"> <li>• <b>Alternate Produce and Add IR</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;0&gt; (zero)</li> <li>• <b>Produce and Add IR</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;/&gt; (slash)</li> <li>• <b>Update and Add IR</b> or press &lt;Alt&gt;&lt;K&gt;&lt;{&gt; (left brace)</li> </ul> <p>When the system asks you to confirm the action, click <b>OK</b> to confirm or <b>Cancel</b> to continue editing the master record.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Connexion performs the specified action on the associated master record and then adds the new institution record.</li> <li>• Connexion redisplay the master record. A confirmation message appears above the record, giving the assigned OCLC control number for the new IR.</li> <li>• If the action on the master record fails, Connexion redisplay the master record indicating validation errors. The system does not add the new IR to WorldCat. Correct the errors and then try the action again.</li> <li>• If the action on the master record succeeds, but the IR is not added, Then the IR has failed validation. This can occur if you set a higher validation level for IRs than for master records (for example, level for master records is <b>Basic</b> and level for IRs is <b>Full</b>). Connexion displays a message instructing you to derive a new IR from the master record, correct any errors, and then add the IR to WorldCat.</li> <li>• When you add your first IR to a master record, Connexion sets your institution-level holdings, if not already set.</li> </ul>

## Use Institution Records

### Add institution record derived from a master record or another IR

**Caution:** You must add an IR workform to WorldCat before logging off. Otherwise, the record is lost. IR workforms cannot be saved for later completion. Instead, add the workform (link it to the associated master record. To modify the IR, retrieve the master record, display the new IR, edit it, and then replace the IR.

	Action
1	In the displayed IR workform (derived from a master record or another institution record), edit the new IR as needed.
2	<p><b>Add institution record</b></p> <p>On the Action list in the IR workform, click <b>Add Institution Record</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;N&gt; (or &lt;Alt&gt;&lt;J&gt;, &lt;N&gt;)..</p> <p>When prompted to confirm the action, click <b>OK</b> to continue. Or click <b>Cancel</b> if you decide not to add the IR.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Connexion updates holdings for the associated master record and then adds the new institution record. Local data fields in the IR are retained.</li> <li>• Connexion redisplay the new IR with its assigned OCLC control number. A confirmation message appears above the record.</li> <li>• If the IR is not added, Connexion redisplay the IR with validation errors indicated. Correct the errors and then try again to add the IR.</li> <li>• When you add your first IR to a master record, Connexion sets your institution-level holdings, if not already set.</li> </ul>

### Derive institution record from a master record or another IR

- If you have existing institution records attached to a master record, you can derive a new IR from an IR already attached to the master record.
- If you are attaching your institution's first IR to a master record, you can derive the new IR from the master record or from another institution's IR for the same master record.
- In either case, deriving lets you reuse applicable content, save keystrokes, and reduce errors.

**Note:** You can also use an institution record to derive a new master record or constant data record, whether or not you are authorized to create and maintain IRs.

	<b>Action</b>
1	<p>Retrieve and display a master record or display an attached institution record from which you want to derive a new IR. You can derive an institution record from an IR contributed by your library (in edit mode) or from an IR contributed by another institution (viewed in display mode).</p>
2	<p>On the Edit list click <b>Derive New Institution Record</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;:&gt; (colon) (or &lt;Alt&gt;&lt;J&gt;, &lt;:&gt;).</p> <p>When the system asks whether you want to transfer fixed-field values from the base record to the new IR, click <b>Yes</b> to transfer fixed-field data. Or click <b>No</b> to create the IR with default fixed-field data.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• The system displays the new institution record workform in edit mode.</li> <li>• The word NEW appears in place of an OCLC control number. The system assigns an OCLC control number when you add the IR workform to WorldCat.</li> <li>• The record header area identifies the new record as an institution record workform and shows the OCLC control number of the master record (from field 001 if you derived the IR from the master record; from field 079 if you derived the IR from another IR. The header also contains information from field 245 of the base record.</li> </ul>
3	<p>Edit the record to add or modify content. Then add the new IR to WorldCat. See the preceding section for instructions.</p> <p><b>Caution:</b> You must add an IR workform to WorldCat before logging off. Otherwise, the record is lost. IR workforms cannot be saved for later completion. Instead, add the workform (link it to the associated master record. To modify the IR, retrieve the master record, display the new IR, edit it, and then replace the IR.</p>
4	<p><b>Add institution record</b></p> <p>On the Action list click <b>Add Institution Record</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;N&gt; (or &lt;Alt&gt;&lt;J&gt;, &lt;N&gt;)..</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Connexion validates the institution record and the master record. If the system reports validation errors, correct them and then try again to add the record.</li> <li>• When both records pass validation, Connexion links the institution record to the master record in WorldCat.</li> <li>• When you add your first IR to a master record, Connexion sets your institution-level holdings, if not already set.</li> <li>• The added institution record reappears in display mode.</li> </ul>

**Content transferred to derived institution record** By default, Connexion transfers data from the following MARC fields in the base record: 006, 007, 01X to 09X, and 1XX to 9XX. See the next section for information on customizing the list of fields to transfer.

Connexion supplies the following default information in the new IR workform:

- A read-only 079 field containing:
  - subfield \$a (not repeatable)  
**IR derived from master record.** \$a contains the OCLC control number from field 001 of the master record, preceded by the prefix ocm or ocn.
  - IR derived from another IR.** \$a contains the OCLC control number of the master record from field 079 of the institution record, preceded by the prefix ocm or ocn.
  - subfield \$z (repeatable), containing OCLC control numbers of any deleted master records.
- Field 040 containing your institution symbol in read-only subfield \$c. Data from other 040 subfields (\$a, \$b, \$d, and \$e) **always transfers** from the base record, even if you do not select the 04x tag group in the **Derive Record Fields for Institution Records** setting. (See the next section for details.)
- Default fixed-field values appropriate for the record type, if you did not transfer fixed-field values from the base record.
- The following fields as indicated by the cataloging profile of your institution:
  - Empty call number field** determined by your profiled classification scheme: 055, 070, 080, 086, 090, 092, or 096
  - Field 049** containing your default holding library code.

**Content not transferred to a derived IR.** The following data does not transfer from the base record to the IR workform:

- Field 001. The word NEW appears in place of an OCLC control number. The system assigns a unique control number when you add the IR to WorldCat.
- Holdings information
- The following fields never transfer to a derived IR, even you choose their tag groups to be transferred:
  - 012 (Library of Congress use only)
  - 019 (any OCLC control number(s) in field 019 transfer to one or more subfield \$z(s) in field 079.)
  - 066 **Note:** Field 066 indicates the record contains content entered in a non-Latin script. Connexion browser does not support entry of non-Latin script, though scripts are shown in display mode (read-only). In edit mode, the notation **Non-Latin script suppressed** appears at the top of the record.
  - 029

## Use Institution Records

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### Customize fields transferred to derived institution records

This setting determines which variable fields transfer when you derive an IR from a master record or an institution record.

	Action
1	On the General tab, click <b>Admin</b> At the Preferences screen, click <b>Cataloging Options</b> .
2	On the Cataloging Options screen, locate the <b>Derive Record Fields for Institution Records</b> setting.
3	<b>Select variable fields to transfer</b> <ul style="list-style-type: none"> <li>To transfer a field or a field group to a derived institution record, select the check box for the field(s) you want to include.</li> <li>To prevent transfer of a field or field group, clear the check box.</li> </ul> <b>Default setting:</b> All listed MARC fields and tag groups are selected.
4	Click <b>Save My Default</b> or <b>Save for Session</b> .

### Derive new master or constant data record from an institution record

**Note:** The ability to derive new master or CD records from an IR is available to all OCLC catalogers, whether or not they are authorized to create and maintain IR.

	Action
1	Open an institution record from which to derive a master or CD record. You can derive from your IR or any other library's IR.
2	On the Edit list take either of these actions: <ul style="list-style-type: none"> <li><b>Derive New Master Record</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;D&gt;</li> <li><b>Derive New Constant Data Record</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;4&gt;</li> </ul> <b>Results</b> The system transfers data to the derived record based on fields selected for the <b>Derive Record Fields -- Fields to Transfer</b> option for master or CD records (General tab, Preferences, Cataloging Options) and then displays the new record in edit mode.
3	Edit the record as appropriate and follow your usual procedures for completing new bibliographic records or constant data records.

## 5 Edit and validate institution records

### Editing capabilities for institution records

- If your institution is profiled as a contributor of institution records, you can add new institution records for your institution and also edit, replace, delete, or move institution records contributed by your institution.
- You must be logged on with a Full-level (or higher) Connexion authorization to add, edit, replace, delete, or move an IR.
  - With at least a Full-level authorization, you can edit IRs that belong to your institution. Your institution records open in edit mode so you can begin entering or updating content immediately.
  - You cannot edit IRs that belong to another institution. Other libraries' IRs open in display mode (view only). You can derive a new IR or a new master record from another institution's IR in display mode and then complete the record for your use.
  - Unavailable actions.** You cannot save an institution record (neither another library's IR nor your own). However, you can save a master record with IRs attached and then access linked IRs from the saved record.

### Read-only IR fields

- The system prevents you from adding, removing, or editing the following fields in an institution record:
  - 040, subfield \$c
  - 079 (all subfields)

### Use command shortcuts: keystrokes for actions

Action	Procedure
Show the Command Shortcuts box above the record header	Press <Alt><K>.
Hide the Command Shortcuts box; show the Edit, Action, and View lists	Press <Alt><J>.
Show or hide the scrollbar in the Command Shortcuts box. Showing the scrollbar reduces the size of the box.	Click <b>Show/Hide Command Scrollbar</b> . Or Press <Alt><K> and then < > (<Shift>< >).
Use a command shortcut when the Command Shortcuts box is visible. Or show the box and use a shortcut.	Press and release <Alt><K> and then press the shortcut key for the command. Or In the Command Shortcuts box, click the command you want to use.
Use a command shortcut when the Command Shortcuts box is hidden. Do not show the box; keep the Edit, Action, and View lists visible.	Press and release <Alt><J> and then press the shortcut key for the command.

## Use Institution Records

### Validate institution records

- When you take actions that involve both the master record and an IR, or when you export an IR, Connexion validates both records at the validation levels you can select on the Cataloging Options screen. You can set levels separately for master records and IRs.
- When you add or replace an IR, Connexion always validates the record structure. You can also select Basic or Full validation for IRs. See the next section for instructions.

	Action
1	Display an IR workform or an existing IR.
2	On the Edit list, click Validate Record or press <Alt><K><V> (or <Alt><J><V>).
3	Connexion validates the IR and either confirms successful validation or redisplay the record with errors indicated.
4	If the system reports errors, correct them and then try again to validate the IR.

### Specify validation levels for institution records

**Note:** When you select Basic or Full validation, each record must pass validation (in addition to the default Structure check) before Connexion completes the add or replace action. (For export, the default level is None, but you can change the level to Basic or Full.) If an IR fails validation, you must correct the errors identified and then retry the add, replace, or export action.

**Note:** You can also set the validation level for exporting IRs on the Export Option screen using the setting labeled **Institution Records** under **Validate Exported Bibliographic and Authority Records**. If you change the setting on either screen, it changes automatically on the other screen.

	Action
1	On the General tab, click <b>Admin</b> . At the Preferences screen, click <b>Cataloging Options</b> .
2	On the Cataloging Options screen, locate the <b>Validation Levels</b> setting.
3	<p><b>Add or Replace Bibliographic Institution Record</b></p> <p>Select the level of validation to apply when you add or replace an IR.</p> <ul style="list-style-type: none"> <li>• <b>Structure (Default).</b> 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.</li> <li>• <b>Basic.</b> Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure.</li> <li>• <b>Full.</b> Verifies record structure (as for basic validation) and also checks relationships between elements.</li> </ul> <p><b>Default setting:</b> Structure.</p>

	Action
4	<p><b>Export Bibliographic Institution Record</b>                      Select the level of validation to apply when you export a single IR.</p> <ul style="list-style-type: none"> <li>• <b>None.</b> No validation for exported records.</li> <li>• <b>Basic.</b> Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure.</li> <li>• <b>Full.</b> Verifies record structure (as for basic validation) and also checks relationships between elements.</li> </ul> <p><b>Default setting:</b> None.</p>
5	Click <b>Save My Default</b> or <b>Save for Session</b> .

**Actions used while editing an IR**

- While editing, use the Edit, Action, and View lists to take these actions.
- Or use the corresponding keystroke for the action.
- Unsupported actions for institution records:
  - Save Record
  - Control Headings

Action	Procedure
Show your library's attached IRs from master record	<p><b>From the master record</b>                      On the Action list, click <b>Show My Institution Records</b> or press &lt;Alt&gt;&lt;K&gt;, &lt;;&gt; (semicolon) (or &lt;Alt&gt;&lt;J&gt;, &lt;;&gt;).</p> <p><b>Results</b>                      Depending on how many IRs you have contributed for this master record, Connexion displays a single IR or a list of all your IRs.</p>
Cancel Changes (Discard all changes made since you began editing the record. Do not continue editing.)	<p>On the Edit list click <b>Cancel Changes</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;2&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;2&gt;).</p> <p>The system asks you to confirm that you want to discard changes you made while editing the record. Click <b>OK</b> to cancel edits. Or click <b>Cancel</b> to keep your changes and continue editing the record.</p> <p><b>Results</b>  <b>Existing IR.</b> The system redisplay the record as retrieved from WorldCat, in display mode.  <b>New IR.</b> The system removes the record and returns you to Search WorldCat screen.</p>
Unedit Record (Reverse all changes but keep record open for editing)	<p>On the Edit list click <b>Unedit Record</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;Z&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;Z&gt;).</p> <p><b>Results</b>  <b>Existing IR.</b> The system redisplay the record as originally retrieved from WorldCat. The record remains in edit mode so you can continue editing.</p>

Action	Procedure
Complete editing and preserve changes by taking a final action on the IR	<p><b>Caution:</b> You must add an IR workform to WorldCat before logging off. Otherwise, the record is lost. IR workforms cannot be saved for later completion. Instead, add the workform (link it to the associated master record. To modify the IR, retrieve the master record, display the new IR, edit it, and then replace the IR.</p> <p>Take a final action on the institution record. Final actions are: Replace Record (for an updated IR) and Add Record (to attach a new IR). Before adding or replacing the record, the system automatically validates the record. If the record fails validation, correct the errors reported and then retry adding or replacing the record.</p>
Display Record	View the record in display-only view: On the Edit list click <b>Display Record</b> or press <Alt><K> and then <T> (or <Alt><J> and then <T>).
Back to Editing	Return to edit mode after viewing a record in display-only mode: On the Edit list click <b>Back to Editing</b> or press <Alt><K> and then <L> (or <Alt><J> and then <L>).
Reformat Record	On the Edit list, click <b>Reformat Record</b> or press <Alt><K> and then <R> (or <Alt><J> and then <R>). <b>Results</b> Reformatting arranges fields in (approximate) ascending tag number order and removes empty fields.
Apply CD By Name	<ol style="list-style-type: none"> <li>On the Edit list, click <b>Apply CD By Name</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;5&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;5&gt;). An entry opens above the record header.</li> <li>In the <b>Specific CD Name</b> text box, type the name of the constant data record you want to apply.</li> <li>Click <b>Apply CD</b> or press &lt;Enter&gt;.</li> </ol>
Apply CD From List	<ol style="list-style-type: none"> <li>On the Edit list, click <b>Apply CD From List</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;6&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;6&gt;).</li> <li>In the list of constant data records, click the hyperlinked name of the LH constant data record you want to apply.</li> </ol>
Apply Default CD (Not available if you have not set a constant data record as default CD.)	On the Edit list, click <b>Apply Default CD</b> or press <Alt><K> and then <C> (or <Alt><J> and then <C>). The system merges your default constant data with the record you are editing.

**Editing text:  
techniques and  
keystrokes (MARC  
Template edit view)**

Action	Procedure
Move cursor from any variable-length field to the 007 field (or first variable field if no 007.	Press <Alt></> (slash).

Action	Procedure
Move to the top or bottom of the record screen	Press <Ctrl><Home> to move to the first input box on the screen. Press <Ctrl><End> to move to the last input box on the screen. Or Click the <b>down arrow</b> button (right end of blue header and footer bar).
Show or hide the Functions list	Press <Alt><Y>.
Go to the Active Records screen	Press <Ctrl><Shift><9>.
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 <b>Delete Text</b> . The system removes the text of the field; tag and indicators remain. <b>Empty fields removed</b> The empty field is removed if you reformat the record or take a final action.
Undo last text change	To reverse the most recent text change, use the standard Windows <b>undo</b> keystroke: <Ctrl><Z>.
Enter diacritics and special characters Character chart window <b>Internet Explorer for Windows only</b>	<ol style="list-style-type: none"> <li>1. Place the cursor where you want to insert a diacritic or special character.</li> <li>2. Press &lt;F7&gt;.</li> <li>3. In the Enter Diacritics and Special Characters window, click a character or diacritic to insert it at the cursor position.</li> </ol> <ul style="list-style-type: none"> <li>• <b>Note: Diacritic follows letter.</b> To insert a diacritic, first type the letter it modifies. Then insert the diacritic following the letter. <b>Example:</b> To enter the letter <b>u</b> with an <b>umlaut</b>, type <b>u</b>. Then open the Enter Diacritics and Special Characters window and, in the character chart, click the <b>umlaut</b> symbol.</li> </ul> <p><b>(Note: Windows only.</b> Not supported by Macintosh versions of IE.)</p>
Table of ALA-defined diacritics and special characters	<p>On the header bar (black bar at the top of every system screen), click <b>Diacritics</b>.</p> <p>Use the table to identify a character, find a character by name, or copy a character for input in a record.</p>
Add a field or multiple fields	<ol style="list-style-type: none"> <li>1. Move to the field below which you want to add field(s).</li> <li>2. In the Functions list click <b>Add Single Field Below</b> or <b>Add Multiple Fields</b>.</li> <li>3. <b>Multiple fields</b> In the dialog box, type the number of fields to add (1-10). Click <b>OK</b>.</li> </ol> <p>Inserted fields duplicate the MARC tag of the preceding field. Change the tags and supply indicators as appropriate.</p>

Action	Procedure
Copy field	<ol style="list-style-type: none"> <li>1. In the Functions list click <b>Copy Field</b>.</li> <li>2. Move to the field below which you want to insert the copied field.</li> <li>3. In the Functions list click <b>Paste Field</b>.</li> </ol>
Move field (cut and paste)	<ol style="list-style-type: none"> <li>1. In the Functions list click <b>Cut Field</b>.</li> <li>2. Move to the field below which you want to insert the moved field.</li> <li>3. In the Functions list click <b>Paste Field</b>.</li> </ol>
Delete field	In the Functions list click <b>Delete Field</b> .
Enter subfield delimiter	<ol style="list-style-type: none"> <li>1. Enter a subfield delimiter (‡): Type a single <b>dollar sign (\$)</b>. Press &lt;Shift&gt;&lt;4&gt; to create the <b>\$</b>. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode.</li> </ol>
Dollar sign as currency symbol	<p>To enter a <b>dollar sign</b> as a currency symbol (not to represent a subfield delimiter): Type <b>2</b> dollar signs (<b>\$\$</b>). Do not type a space between the 2 dollar signs.</p>

**Edit mode and display mode**

Mode	When in Effect
Edit mode	<p>When you view institution records for your institution. To begin editing:</p> <ul style="list-style-type: none"> <li>• Take the <b>Edit Record</b> action on a record in display mode.</li> <li>• Click the entry number of a record listed in search results</li> <li>• Derive a new institution record from an existing IR or master record.</li> </ul>
Display mode	<p>When you view institution records for another institution.</p> <p><b>Display mode is also in effect for your own institution records:</b></p> <ul style="list-style-type: none"> <li>• When you take the <b>Display Record</b> action on a record you are editing.</li> <li>• After you use <b>Cancel Changes</b> to end editing.</li> </ul>

**Institution record views (edit and display)**

The table describes how institution records appear in edit mode or display mode.

View	Description
MARC Template edit view	Template view for editing in OCLC-MARC bibliographic record format. Compliant with MARC 21 standard. Content for each field is viewed and edited in a row of text boxes. Provides Functions list for adding/removing fields. To view input guidelines, select <b>Help</b> on the Functions list or type a tag number or an element label (for elements in fixed-length fields) in the MARC Help text box and click <b>MARC Help</b> .
MARC Text Area edit view	Alternative view for editing in OCLC-MARC bibliographic record format. Compliant with MARC 21 standard. Content for all variable-length fields is viewed and edited in a single text box. For users who prefer full-screen editing. No Functions list; add/, delete, or move fields using basic text-editing techniques. To view input guidelines, type a tag number or an element label (for elements in fixed-length fields) in the MARC Help text box and click <b>MARC Help</b> .
MARC display view	View for displaying records in read-only format. Other institutions' IRs always appear in this view. To view input guidelines, click a hyperlinked tag number or type a tag number or an element label (for elements in fixed-length fields) in the MARC Help text box and click <b>MARC Help</b>

**Logoff warning for institution records**

**Caution: complete IR before logging off:** Because you cannot save institution records or IR workforms, you must complete your work on the IR, by adding it to WorldCat or replacing an existing IR, **before** you log off. Otherwise, your work on the record is lost.

- When you log off, Connexion checks for institution records currently in edit mode.
- If you started editing an institution record or created a new IR, but have not taken a final action on the new or modified IR, the system reminds you to complete editing and take an action before logging off.
- To view the IR(s), on the message screen click **Show Active Records** or press <Ctrl><Shift><9>. Or, on the Cataloging tab, under Show, click **Active Records** or press <Ctrl><Shift><9>. At the Active Records screen under Bibliographic Records, attached IRs are listed under the hyperlinked title of the bibliographic record. Click the link for the IR you want to review.
- To log off and discard 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**.

## 6 Replace, export, move, or delete institution records

### Replace an institution record

**Caution:** If you modify and replace a master record, Connexion **does not update your attached institution record(s)** with the changes made in the replaced master record. To keep your existing IR(s) updated, you must edit each IR manually to match the replaced master record, and then replace the IR.

**Note: IR with non-Latin script cannot be replaced or moved.** In Connexion browser, which does not support adding or editing non-Latin scripts to records, you cannot replace or move an IR that contains non-Latin script. You can edit the record, update holdings, export, and take other actions.

**Note: Lock not required to replace an IR.** You do not need to lock an institution record in order to replace it. Lock is required only when replacing a master record.

	Action
1	Retrieve an existing institution record that you need to revise and then replace in WorldCat.
2	Edit the record to add, change, or remove content
3	<p><b>Replace IR</b> On the Action list click <b>Replace Institution Record</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;A&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;A&gt;).</p> <p><b>Results</b> The system asks you to confirm that you want to replace the institution record.</p>
4	<p>Click <b>OK</b> to replace the record. Or click <b>Cancel</b> to resume editing the record.</p> <ul style="list-style-type: none"> <li>• Connexion validates the IR. If the system reports validation errors, correct them and try again to replace the record.</li> <li>• When the IR is valid, Connexion replaces it in WorldCat.</li> <li>• The replaced record reappears in edit mode.</li> </ul>

### Export an institution record

Any cataloger, including those with read-only access to institution records, can export an existing institution record (an IR added to WorldCat and assigned an OCLC control number). You cannot export an institution record workflow.

**Caution:** If the IR you want to export was not contributed by your library, be sure to turn off validation before exporting; otherwise, validation fails, since the system-supplied field 040 subfield \$c does not contain your institution symbol. To set a validation level for exporting IRs, go to the Export Options screen. (On the General tab, click Admin. On the Preferences screen, click Export Options.)

Action	
1	Retrieve an existing institution record that you need to export.
2	<p><b>Export the IR</b> On the Action list click <b>Export Record in MARC</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;E&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;E&gt;).</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Export occurs immediately. Because you cannot save IRs, batch export is not available.</li> <li>• By default, Connexion does not validate exported IRs. You can set a Basic or Full validation level for exported IRs in either Cataloging Options or Export Options.</li> <li>• Connexion uses the same settings you selected for other bibliographic records in Export Options: export destination, fields to delete from exported bibliographic records, export file type and file name, etc..</li> </ul>

**Move an institution record**

If one of your institution’s IRs is attached to the wrong master record, you can move the IR to the appropriate master record.

**Note:** If an appropriate master record does not exist, you can derive a new master record from this IR, add the new master record to WorldCat, and then move this IR to the new master record.

**Note: IR with non-Latin script cannot be replaced or moved.** In Connexion browser, which does not support adding or editing non-Latin scripts to records, you cannot replace or move an IR that contains non-Latin script. You can edit the record, update holdings, export, and take other actions.

Action	
1	Retrieve an existing institution record that you need to move to a different WorldCat master record.

	Action
2	<p><b>Move an IR</b>                      On the Action list click <b>Move Institution Record</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;M&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;M&gt;).</p> <p>Connexion prompts you to supply the OCLC control number of the master record to which you want to move the IR.</p>
3	<p>In the text box labeled <b>Move Institution Record to OCLC #</b>, type the OCLC control number of the master record to which you want to attach this institution record.</p> <p>Then click <b>Move Institution Record</b> to move the IR.                      Or click <b>Cancel</b> to cancel moving the IR.</p> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• Connexion redisplay the institution record with a confirmation message. In the IR, field 079 \$a contains the OCLC control number of the master record to which the IR is now attached.</li> <li>• <b>Holdings not deleted when you move an IR.</b> Even if the IR you move is the last IR attached to the master record it was moved from, Connexion <b>does not</b> delete your institution’s OCLC symbol from the master record. To remove your holdings symbol, you must take a separate <b>Delete Holdings</b> action on the master record from which you moved your last IR.</li> </ul>

**Options for deleting IRs and your holdings symbol**

- **Delete Holdings.** From a master bibliographic record, you can take the **Delete Holdings** action to remove your institution’s symbol from the master record.
  - If you attempt to remove your institution’s symbol from a master record to which you have linked IRs, Connexion reminds you that IRs are attached and asks if you want to delete both the IRs and your institution’s symbol.
  - Respond **Yes** to delete the IRs and remove your holdings symbol. Respond **No** to cancel the action. Connexion cannot remove your symbol unless you confirm that you want to delete attached IRs.
- **Delete Institution record.** From an institution record, use the **Delete Institution Record** action to delete the IR you are viewing.
  - When the IR you delete is the last your institution has attached to the master record, Connexion asks you whether you want to delete your institution’s symbol as well.
  - Respond **Yes** to remove your institution’s symbol. Respond **No** to delete this IR but keep you symbol attached to the record.
- The next section explains how to delete a single institution record.
- The section titled **Delete all institution records** explains how to delete all your IRs and delete your symbol with a single command.

**Delete an institution record**

<b>Action</b>	
1	Retrieve an existing institution record that you want to delete.
2	On the Action list click <b>Delete Institution Record</b> or press <Alt><K> and then <X> (or <Alt><J> and then <X>).  The system asks you to confirm that you want to delete the institution record.
3	Click <b>OK</b> to delete the record. Or click <b>Cancel</b> if you decide to keep this IR.  <b>Results</b> <ul style="list-style-type: none"> <li>• <b>Not the last IR.</b> If you have other institution records linked to the master record, Connexion deletes the record. The record reappears in display mode, with a message confirming that it has been deleted.</li> <li>• <b>Last IR.</b> If you delete your last IR linked to the master record, Connexion deletes the record and then asks whether you want to remove your institution's holdings symbol. Click <b>Yes</b> to remove your institution's symbol. Click <b>No</b> to keep your holdings symbol linked to the master record. If you select <b>Yes</b>, Connexion removes your symbol. The master record appears with a confirmation message at the top. In the record, the holdings statement indicates that your institution has no holdings.</li> </ul>

**Delete all institution records**

- If you know that you need to delete all your institution records for an item, and also remove your institution's symbol, you can complete both tasks by taking the **Delete All Institution Records** action.
- You can take this action from the master record.

<b>Action</b>	
1	Open the master record from which you want to delete all institution records and remove your institution's symbol.

	<b>Action</b>
2	<p><b>From the master record</b>                      On the Action list click <b>Delete All Institution Records</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;O&gt; (letter O) (or &lt;Alt&gt;&lt;J&gt; and then &lt;O&gt;).</p> <p><b>Results</b>                      Above the master record, Connexion asks you to confirm whether you want to delete all your IRs and whether you also want to remove your institution's holdings symbol.</p>
3	<p>Confirm or cancel the action:</p> <ul style="list-style-type: none"> <li>• <b>Delete all IRs and holdings symbol.</b> Select the <b>Remove your institution's symbol from bibliographic record</b> check box and then click <b>Delete Institution Records</b>.</li> <li>• <b>Delete IRs, retain your institution's symbol.</b> Clear (uncheck) the <b>Remove your institution's symbol from bibliographic record</b> check box and then click <b>Delete Institution Records</b>.</li> <li>• <b>Cancel deleting all IRs.</b> Click <b>Cancel</b> if you decide to keep your existing IRs and retain your holdings symbol attached to the master record.</li> </ul> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• <b>Delete all IRs and symbol.</b> Connexion deletes the IRs and your institution's symbol from the record. A confirmation message states that your holdings were deleted and gives the number of IRs deleted.</li> <li>• <b>Delete IRs, retain symbol.</b> Connexion deletes the IRs and displays a confirmation message that gives the number of IRs deleted.</li> </ul>

**Other supported actions from institution records**

- See details on creating IRs, deriving new records from IRs, and adding IRs to WorldCat in Create and add institution records .
- See details on editing and validating IRs in Edit and validate institution records .
- Display Local Holdings (View list) lets you view local holdings records linked to the master record. IRs themselves cannot have linked LHRs.
- Edit Local Holdings (Action List) lets you edit your library's LHR(s) for the master record.
- Display Find in a Library (View list) displays the Find in a Library view for the master record.

**Unsupported actions for institution records**

The following actions are not available for IRs:

- Saving institution records.
- Controlling headings (link heading fields to authority records) in institution records.