

OCCLC Connexion Guides

OCCLC CatExpress User Guide

Last updated: 5/26/11

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Introduction to OCLC CatExpress

In this chapter

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1.1 CatExpress: Overview

What is CatExpress? The OCLC® Cataloging Express service provides an easy-to-use Web interface for copy cataloging. Copy cataloging is selecting an existing bibliographic record from WorldCat®, adding local data to it, and then adding the record to your local catalog.

OCLC institution symbol The **Save to Catalog** action attaches your OCLC institution symbol to the record in WorldCat and creates an archival record stored at OCLC. Attaching your institution symbol establishes that your institution holds the item described by the record. Use this information to determine if you hold an item. Others use this information for resource sharing activities. Each institution symbol may have several holding library codes to designate sub-collections or holdings.

Local system record loading After cataloging an item, you obtain a bibliographic record for loading into your local library system. If you are profiled for the OCLC MARC Subscription Service, OCLC creates a file of the records you catalog and makes the file available the next day. You retrieve the file from OCLC's Product Services web site and load it into your local system. Or, if you are profiled for record export, the system exports a record for each item cataloged to a file located on an OCLC Connexion® server. Records are added to the file until you download it.

Authorization and password You, your local system administrator and regional service provider staff work together to profile and set up CatExpress. Your regional service provider provides the authorization number. You choose your password.

Authorization type Depending on your authorization type, you may have access to either the cataloging system and CatExpress, or CatExpress only.

CatExpress and cataloging system	CatExpress only
Access to all cataloging system and CatExpress functions	Access to CatExpress functions only

Summary of CatExpress process

	Action
1	Log on to OCLC CatExpress. Go to the Connexion® browser logon screen at http://connexion.oclc.org/ .
2	Search for and identify a record that matches the item you are cataloging.
3	Enter a valid holding library code.
4	Process the record. Add local data and click Save to Catalog . If you have no local data to add (or will add it after downloading records into your local system), click Save to Catalog . You may also view, edit, and print labels.
5	Repeat steps 2 through 4 for each item you are cataloging.

Browser support and recommended settings (continued)

	Action
6	If profiled for export, while logged on to CatExpress, download a file of exported records from the Connexion server.
7	When finished cataloging items, log off.
8	If profiled for MARC Subscription Service, download your records from OCLC's Product Services Web site the following day, and load it into your local online system.

OCLC catalog cards

OCLC catalog cards are not available with CatExpress.

Reminders for Connexion cataloging users

- If you use CatExpress for a portion of your workflow, this activity is included in the rate for your cataloging subscription.
- **Record export.** CatExpress subscribers are profiled for OCLC MARC Subscription or for export. Holdings are set automatically upon export for CatExpress subscribers. Member libraries using CatExpress for updating holdings in WorldCat may be profiled for MARC Subscription to receive records for loading into a local system. Or, for member libraries profiled to export records, records from CatExpress are exported to files on the Connexion server.
- The MARC Subscription is optional if you are using CatExpress only to delete holdings.

If you need help

If you need help accessing the system, contact your local system administrator or Internet service provider.

Click **Contact** (in the Header bar) for help in contacting your OCLC regional service provider or OCLC Customer Support.

If you need to contact OCLC Customer Support when not logged on, you can call 1-800-848-5800 or send an e-mail message to support@oclc.org.

Browser support and recommended settings

Notes to CatExpress users

OCLC Connexion browser is the cataloging system of which CatExpress is a part. CatExpress operates within the Connexion environment, so you use Connexion to access and use CatExpress. Requirements and recommendations for Connexion apply also to CatExpress.

However, examples of possible problems may mention advanced cataloging functions of Connexion that are not available to CatExpress subscribers.

Browser support and recommended settings (continued)

Browser support

Browser	Recommended	Notes
Internet Explorer MSN Explorer	Version 6.0 through 8.0	MSN Explorer is based on Internet Explorer and should work with all system functions. Note to Macintosh users: IE 5.2 running under the OS X operating system has serious flaws that prevent many Connexion functions from working properly. Under earlier versions of the Macintosh OS, IE 5.1 or 5.0 may work adequately with Connexion.*
Firefox	Most recent release of version 3.0.x	Version 3.0.6 or later is strongly recommended due to improved performance and security. Earlier versions work with most Connexion functions but are not preferred. Firefox is based on Mozilla's Gecko layout engine. Its functionality is similar, but not identical, to that of the Mozilla browser.
	*Macintosh users: OCLC does not systematically test Connexion with Macintosh hardware, operating systems or browsers. Advice to Macintosh users is based on limited testing and user reports.	

Connexion browser and Internet Explorer 7 and 8

Users have requested information regarding Connexion's compatibility with Internet Explorer 7 and 8 (IE7 and IE8). OCLC supports Internet Explorer 7 or 8 for use with Connexion browser. Issues are addressed through application changes or suggested workarounds.

for details on problems and workarounds, visit

<http://www.oclc.org/connexion/support/connexionIE7andIE8.docx>

Unsupported browsers

The following browsers are not supported for use with the OCLC cataloging system:

- Apple® Safari for Macintosh or Safari for Windows
- Google® Chrome
- Opera
- AOL (America Online)
- Lynx

Browser support and recommended settings (continued)

Browser navigation buttons

Browser button	Notes
Back Forward	Do not use. <ul style="list-style-type: none">• Move among system screens using only the tabs, buttons, keystroke shortcuts, and other navigation features provided in the Connexion interface.
Stop	Do not use. <ul style="list-style-type: none">• The browser's Stop button cannot cancel actions because, in most cases, the action is sent immediately to the server. The use of the stop button can also cause display problems.

Cache settings for best performance

About cache settings

- Browser cache settings determine how your browser handles redisplaying Web pages you have previously viewed.
- The browser may display the page as it exists in temporary storage (the browser's cache area) or download the latest version of the page from the server.
- Using the recommended settings can improve browser performance by instructing the browser to display stored pages, rather than downloading fresh pages from the server, when revisiting a site.
- **Note:** Your browser may already be configured to the recommended settings. Many of these settings are defaults.

Recommended settings

- Set your browser to refresh Web pages **automatically** when necessary. Do **not** specify that the browser refresh a page each time you view it.
- Allocate adequate disk space for the browser cache. 10 MB is recommended. Do **not** specify zero space for the cache, and avoid allowing it to be larger than 50 MB.
- Do **not** configure Internet Explorer to clear the cache each time you exit the browser.
- Retain the browser's History (log of recently visited sites) for 4 days.

Notes on cache size

- By default, recent versions of Internet Explorer assign a very large value for cache size. In some cases it may be 200 MB or higher. Unless you regularly download many large video or Flash files, we recommend that you reduce the value for 'Amount of disk space to use' to 10 MB. This is

Browser support and recommended settings (continued)

more than sufficient for most users and greatly reduces browser overhead for maintaining the cache.

- Firefox defaults to between 5 and 50 MB of cache. You can accept their defaults unless you experience performance problems. To improve performance, it may help to change the cache size to 10 MB. A cache that is too large often causes just as many problems as one that is too small.

Before changing browser settings

- The recommended settings may not work with certain network security configurations or with some web-based applications.
- If you experience problems with Connexion browser or with other web-based applications when using the recommended cache settings, see the section titled *Resolve caching problems* (later in this topic).
- Before changing cache/history settings, write down your current settings so that you can restore them if the new settings cause problems.

Browser	Setup instructions
Internet Explorer	<ol style="list-style-type: none">1. On the Tools menu click Internet Options.2. On the General tab, under Temporary Internet Files, click the Settings button.3. In the Settings dialog box, under Check for newer versions of stored pages, click Automatically.4. Under Amount of disk space to use, type 10 in the text box.5. Then click OK to close the Settings dialog box.6. On the General tab, under History, for Days to keep pages in history, type 4 in the text box.7. On the Advanced tab, under Security (the last group of settings in the list), clear the check box labeled Empty Temporary Internet Files folder when browser is closed.8. Click OK to close the Internet Options dialog box.

Browser support and recommended settings (continued)

Browser	Setup instructions
Firefox	<ol style="list-style-type: none">1. On the Tools menu, click Options.2. In the Options dialog box, click Privacy.3. On the Privacy tab, in the History section, make sure the check box for Remember visited pages for the last ___ days is selected. To specify the number of days, type 4 in the text box.4. On the Privacy tab, in the Private Data section, make sure that the check box for Always clear my private data when I close Firefox is cleared (no check mark).5. Click OK to apply the change and close the Options dialog box. <p>To specify how frequently the cache is refreshed:</p> <ol style="list-style-type: none">1. In Firefox, clear the URL shown in the address bar. Then type about:config and press <Enter>.2. In the Filter box, type cache to view the settings for cache-related preferences.3. For the first item listed, browser.cache.check_doc_frequency, keep the default setting, with the number 3 in the Value column. Note: This setting parallels the Automatically setting recommended for Internet Explorer. <p>Caution: When using the about:config settings, be careful not to accidentally change one of the many other settings on the list. Firefox saves changes automatically when you go to another web page.</p>

Clear browser cache

Note: JavaScript errors after a Connexion release

- If you experience JavaScript errors immediately after a Connexion release, try refreshing affected pages first, or clear your cache once rather than changing your settings.
- For best browser performance, do not clear the cache more often than necessary.
- But to resolve problems immediately after an install, clearing the cache once may be helpful.
- If clearing the cache does not solve a persistent caching problem, see the section titled *Resolve caching problems* (later in this topic). Symptoms of caching problems include: old data repeatedly appearing; check boxes not remaining selected; and changes not being retained.

Browser support and recommended settings (continued)

	Action
1	Close all browser windows, including popups. This step is essential for the cache to be cleared completely.
2	Start just one browser window and navigate to a non-OCLC site such as Google or Yahoo. Do not start any other browser windows until after you complete the cache-clearing process.
3	Clear the cache. Internet Explorer: <ol style="list-style-type: none">1. On the Tools menu click Internet Options.2. On the General tab, under Browsing history, click the Delete button. In the Delete Browsing History dialog box, under Temporary Internet Files, click the Delete Files button. Then click OK.3. Click OK to close the options dialog box. Firefox: <ol style="list-style-type: none">1. On the Tools menu click Options.2. Click Privacy.3. In the Private Data section, click the Clear Now button.4. In the Clear Private Data dialog box, make sure Cache is selected. Select or clear the other check boxes as appropriate.5. Click the Clear Private Data Now button.6. Then click OK to apply the change and close the dialog box.
4	Close, and then restart, the browser. Log on to Connexion browser.

Resolve caching problems

- If, after using previously recommended cache settings and occasionally clearing the cache, you observe caching problems, you may need to change cache settings to correct the problem.
- **Suggested changes.** This section recommends that you set your browser to refresh pages every time you visit a page. Using the settings given in this section slows performance but can improve reliability when a workstation has a cache problem that causes the browser to display expired pages or incorrect data.
- These settings should be compatible with other web-based applications, including the following OCLC services: FirstSearch, and QuestionPoint.
- **Before changing cache settings.** Before changing cache settings, write down your current settings so that you can restore them if the new settings cause problems.

Browser support and recommended settings (continued)

Browser	Setup instructions
Internet Explorer	<ol style="list-style-type: none"> 1. On the Tools menu click Internet Options. 2. On the General tab, under Temporary Internet Files, click the Settings button. 3. In the Settings dialog box, under Check for newer versions of stored pages, click Every visit to the page. 4. Then click OK to close the Settings dialog box. 5. On the General tab, under Temporary Internet Files, click the Delete Files button. In the Delete Files dialog box, select the Delete All Offline Content button. Then click OK. 6. On the Advanced tab, under Security (the last group of settings in the list), select the check box labeled Empty Temporary Internet Files folder when browser is closed. 7. Click OK to close the Internet Options dialog box.
Firefox	<p>To refresh the cache each time you visit a page:</p> <ol style="list-style-type: none"> 1. With Firefox open, clear text in the address bar. Then type about:config and press <Enter>. 2. In the Filter box, type cache. 3. Change the browser.cache.check.doc.frequency setting value to 1. Note: This setting corresponds to the Every visit to the page setting in Internet Explorer. 4. To apply the change, close Firefox. Or go to another web address by clicking the Home button or typing a URL in the address bar. <p>To clear the cache (and/or other data) when you close Firefox:</p> <ol style="list-style-type: none"> 1. On the Tools menu, click Options. 2. In the Options dialog box, click Privacy. 3. On the Privacy tab, in the Private Data section, select the check box for Always clear my private data when I close Firefox. 4. In the Private Data section, click the Clear Now button. 5. In the Clear Private Data dialog box, make sure Cache is selected. Select or clear the other check boxes as appropriate. All selected types of data will be cleared when you close Firefox. 6. Then click OK to apply the change and close the dialog box. 7. Click OK to apply the change and close the Options dialog box.

Cookie options

About cookies

- A **cookie** is a message a web server sends to your browser. Usually, cookies store information the server uses to manage the session. When you close your browser, cookies that remain in memory are saved to a file on your hard disk. Internet Explorer saves individual text (*.txt) files in a **cookies** folder (locations vary with browser version and Windows version).

Browser support and recommended settings (continued)

- Connexion browser uses cookies to update the session timer and keep track of your current screen. Because they are constantly recycled, cookies occupy negligible space in memory or on your hard disk.
- The timer function sends a cookie for each tick of the timer; each new cookie replaces the previous one. Each screen includes a small cookie in the HTTP header, but again the cookie overwrites the one sent with the previous screen.
- **Security/privacy.** Cookies are not required to use this system. However, some useful optional features will not work correctly if you set your browser to reject cookies. Specifically, the session countdown timer and the session timeout warning may report incorrect times. Also, without allowing cookies, you cannot save your authorization and password to avoid entering these items each time you log on. Cookies used by this system pose very little security risk because, other than the optional authorization and password (which are encrypted), no other user information is captured.

Recommended settings

- When first installed, both Internet Explorer and Firefox browsers are set to accept all cookies.
- For best results when using Connexion, leave this setting unchanged.

Check your cookie settings

Browser	To check cookie settings
Microsoft Internet Explorer	On the Tools menu click Internet Options . In the Internet Options dialog box, click the Privacy tab. Adjust the setting to Medium or Medium High . Click OK to close the Internet Options dialog box.
Firefox	On the Tools menu click Options In the Options dialog box, click Privacy . In the Cookies section, make sure that Accept cookies from sites is selected (checked). If not, click the box to select the option. Click OK to close the Options dialog box. Note: Connexion does not use third-party cookies. You can clear the box for Accept third-party cookies if you do not visit sites that require them.

Popup blocking software

- Software that blocks the display of popup advertisements from Web sites can interfere with Connexion functions that open separate browser windows. Examples: label displays, the list of keystrokes, authority control, and Help.

Browser support and recommended settings (continued)

- For best results while using Connexion, turn off popup blocking software.
- If you prefer to keep a popup blocker active, configure the software to allow popup windows from the domain **oclc.org**.

If you experience problems with Connexion functions **after** configuring **oclc.org** as an exception, contact the vendor of your popup blocker for information on known problems that might affect its operation.

Note: Popup blocking may be enabled on your workstation even if you have not installed a separate program for that purpose. Recent versions of browsers, security software, and other applications may include a popup-blocking tool or option. Add-on browser toolbars from search engines and portal sites, including the Google Search toolbar and the Yahoo Search toolbar, may also come with default popup blockers that need to be disabled. Before logging on to Connexion browser, verify that you have turned off all popup-blocking functionality on your workstation, or configured blocking to allow popups from the **oclc.org** domain.

Download accelerator software

- Software used to enable faster downloading of files through a Web browser can interfere with Connexion browser functions that involve downloading data to a file on your workstation.
- For best results, before exporting records to a file or creating labels for bibliographic records, turn off any download accelerator software you have installed.

Delayed response: do not repeat action

- Do not click again on a button or link, or repeat a shortcut keystroke, while the system is still processing an action.
- Repeating an action while the system is processing your first request actually slows completion of the requested action. The second click or keypress cancels the initial request; processing starts over from the beginning.
- The system may not respond immediately when you start a search, switch record views, or take action on a record. The specific action requested, the number of other users interacting with the server, and the speed of your Internet connection are among the factors that determine response time.
- **WorldCat interactions.** When your request results in a WorldCat interaction, the system ignores any repeated requests until you reload the page. This prevents added transaction charges and slowed responses that may occur if the system sends repeated commands.
Note: Using the browser's **Stop** button while waiting for a WorldCat

Browser support and recommended settings (continued)

response may prevent the system from reactivating the requested function.

Unicode fonts recommended

- For best results when viewing and editing records and pathfinders, and when viewing web-based resources, specify a **Unicode font** in your browser (font settings are found in Options or Preferences). Using a Unicode font lets you take full advantage of the system's adoption of the Unicode standard for character encoding.
- For an extensive set of diacritics and special characters, OCLC recommends that you have the **Arial Unicode Microsoft** font (Arial Unicode MS) installed on your workstation and specified in your browser. Microsoft provides the font with many applications, including Microsoft Office, FrontPage, and Publisher.

Note: The Arial Unicode MS font is **not** installed by default with these Microsoft applications. For installation instructions, start a Microsoft application such as Word, open Help, and search Help for **unicode** or **Arial Unicode MS**.

- The **Lucida Sans Unicode** font, provided with Microsoft Windows XP and Windows Vista, has a less-complete character set but may meet your needs.
- The system currently enables display and editing of the ALA character set for bibliographic and authority records. For pathfinders, the system supports entry and display of all Unicode characters, including characters from non-Roman scripts. Future releases will expand support for non-Roman scripts.
- The system uses the UTF-8 character format to communicate with Web browsers and as its internal storage format. UTF-8 is a compact encoding of Unicode, a widely adopted standard that supports the communication of a large array of characters from the world's chief languages and scripts.
- **More?** Search Help for the keyword **diacritics** or **Unicode**.

Show Connexion icon in Favorites (bookmarks)

- When you add the URL for the Connexion logon screen to the Favorites (bookmarks) list in your browser, the new Favorites item includes a Connexion icon.
- In Internet Explorer, the Connexion icon may not appear if you previously added the logon screen URL to your Favorites or to the browser's Links bar.

Browser support and recommended settings (continued)

- To show the icon in the IE Favorites and/or Links bar, follow these steps.
Note: Display of icons in Firefox bookmarks may work differently.

	Action
1	In Internet Explorer, delete all existing shortcuts to <code>connexion.oclc.org</code> . this includes items in Favorites and items on the Links bar.
2	Clear the browser cache.
3	Close all browser windows.
4	Start Internet Explorer and go to http://connexion.oclc.org .
5	At the Connexion logon screen, add the URL to the Favorites list. After the item appears with the Connexion icon in Favorites, you can copy the item and paste it on the Links bar or to the desktop.

1.2 CatExpress home page and navigation bar (continued)

1.2 CatExpress home page and navigation bar

About the home page The home page is the first screen you see after you log on to CatExpress.

To return to the home page at any time, click **Home** on the header bar at the top of the screen.

Use the home page to:

- Find links to CatExpress documentation, news, and other useful information.
- View OCLC message of the day.

Links to information on CatExpress and related topics

The gray column on the right provides quick access to:

- News
- CatExpress information
- Legal Information
- WorldCat Statistics
- The OCLC System Alerts page. If you have difficulties while using CatExpress, check this page for information on any known system problems.
- Product Services Web

View OCLC system news

The **News** area provides access to current information of interest to OCLC users. News topics include:

- General OCLC announcements
- News about specific products and services
- Release notes describing recent system updates
- Information on planned system enhancements

Access OCLC system news

Action	Result
On the General tab, click News . Or On the home page, in the gray column on the right, under Topics, click News .	The Search News screen appears. To find items of interest, you can: <ul style="list-style-type: none">• Retrieve all current News items• Retrieve News by category• Search for words in the titles of News items• Search for words in the contents of News items

Navigation bar

The navigation bar:

- Appears at the top of all screens.
- Contains a set of tabs, one tab for each service available to you. Your authorization and/or subscriptions to specific services determine which service tabs appear.
- On each service tab, provides buttons labeled Search, and Other. Click a button for access to a frequently used function.
- On each service tab, lists labeled Search Options, Other Options. Open a list to select a specific function.
- Includes a **General** tab that lets you set preferences to customize the navigation bar, set service-specific options, access OCLC System News, and view web-based documentation for OCLC Connexion.
- Lets you navigate by clicking a tab, a button, or a list option.
- Can be customized to meet your needs. For example, you can hide tabs for services you rarely use, add a horizontal scroll bar, enlarge the tabs and text, or set time options.

1.2 CatExpress home page and navigation bar (continued)

Navigation bar functions for CatExpress subscribers

Service Tab	Button or List Item	Result and Definition
Express	Search Basic Advanced	Search WorldCat via CatExpress to retrieve records needed for copy cataloging. Basic search lets you retrieve records by standard number, title, or keywords. Advanced search lets you combine search terms with Boolean operators, limit search results by date, format, or language, limit results to Internet resources only, and specify sorting of results. Note: Non-subscribers using CatExpress If you use CatExpress for a portion of your workflow, this activity is billed on a per-transaction basis, at the same rate as Connexion activity.
	Other Download Export File Download Records Documentation	Get CatExpress records and check online documentation. Download an authorization-specific file of OCLC-MARC bibliographic records. Records are added to the file as a result of your actions during a session. You must have record export added to your profile. Download your Electronic MARC Subscription records. You must have Electronic MARC Subscription added to your profile. Note: If your records are sent to a third party, you will not see the above download options. Access the CatExpress User Guide on the OCLC web site.

1.2 CatExpress home page and navigation bar (continued)

Service Tab	Button or List Item	Result and Definition
General	<p>News button</p> <p>News Options Search News</p>	<p>Go to the Search News screen.</p> <p>Go to the Search News screen. View OCLC announcements, news about products and services, release notes describing recent system updates, and information on planned system enhancements.</p>
	<p>Admin button</p> <p>Admin Options Preferences</p> <p>User Information</p>	<p>Go to the Preferences screen.</p> <p>Go to the Preferences screen. Customize the navigation bar and other system interface features. Change settings for the session inactivity timer. Set CatExpress options. Set Dewey Services options (if profiled for these services).</p> <p>Go to the User Information screen. View session information for use when requesting support. Enter or change contact information (your name, e-mail address, and phone number).</p>
	<p>Documentation button</p>	<p>Go to a Web page on the OCLC web site that lists WebDewey documentation. Items listed are Web-accessible files in PDF format. View the documentation online or print it for offline reference. The page also lists documentation on other OCLC cataloging services.</p>

1.2 CatExpress home page and navigation bar (continued)

Service Tab	Button or List Item	Result and Definition
Dewey Services (WebDewey) Requires WebDewey subscription	Search button	Go to the Search WebDewey screen
	Search Options WebDewey	Go to the Search WebDewey screen Search the Dewey Decimal Classification.
	User Notes	Go to the Search WebDewey User Notes screen. Search your library's Dewey Notes database to check for notes that apply to your classification task.
	Browse button	Go to the Browse WebDewey screen.
	Browse Options WebDewey	Go to the Browse WebDewey screen. Browse the Dewey Decimal Classification.
	Create button	Go to a User Note workform.
	Create Options User Notes	Go to a User Note workform. Create notes that apply to specific DDC numbers, to types of material you catalog, or to library practices.
	Show button	Go to the Active Records screen.
	Show Options Active User Notes	Go to the Active Records screen. Find links to user note(s) you are currently viewing or editing.

Header bar and links

- The header bar is the black bar at the top of each screen, above the navigation bar.
- Via links on the header bar, you can access the functions listed in the following table.

Header link	Use it to
Home	Return to the system home page.

1.2 CatExpress home page and navigation bar (continued)

Header link	Use it to
Help	Get context-specific Help for the current screen. From the Help window, you can search Help for additional information. Searching Help for CatExpress topics. You have access to all Connexion Help topics, not just those that explain CatExpress functions. When you search Help, use catexpress as one of your search keywords to avoid retrieving nonrelevant topics.
Diacritics	View a table of diacritics and special characters Use the table to identify a character, find a character by name, or copy a character for input in a record.
Contact	Send a problem or question via e-mail to your regional network, service center, or OCLC Customer Support. Send a suggested change or enhancement via e-mail to the development team.
Logoff	Exit CatExpress and return to the login page.

Navigation keys

- You can use tabs, buttons, and lists on the navigation via keyboard only.
- The keystrokes work in all supported versions of Internet Explorer and in supported versions of Netscape 7.
- **Note:** Interface users may have slightly different keystrokes. See Connexion Help for details.

Purpose	Keystroke
Header bar -- select an action	
Home	<Alt><0> (zero)
Help	<Alt><H>
Contact (Support)	<Alt><S>
Diacritics	<Alt><,> (comma)
Logoff	<Alt><L>
Tabs -- select a tab (if it is visible on screen)	
Express	<Alt><E>
Dewey Services	<Alt><D>
General	<Alt><G>
More	<Alt><M>
Buttons -- select a button (on active tab)	
Search Or News on General tab	<Alt><1>
Admin on General tab	<Alt><2>

1.2 CatExpress home page and navigation bar (continued)

Purpose	Keystroke
Documentation on General tab	<Alt><3>
<p>Options lists -- select list (on active tab)</p> <p>Go button off. If you did not add a Go button to the navigation bar,</p> <ul style="list-style-type: none"> • Press the shortcut key for the list. • Then press <down-arrow> once to select first item on the list. <p>Go button on. If you added a Go button to the navigation bar,</p> <ul style="list-style-type: none"> • Press the shortcut key for the list. • Then press <down-arrow> to select a n option. • Then press <Enter> to take action (if you have not moved the cursor from the list). • Or press <Alt><8> to take action (if you moved the cursor to a position in the lower frame of the screen). 	
Search Options	<Alt><!>
Admin Options on General tab	<Alt><@>
Other Options (Express tab only)	<Alt><%>
<p>Bypass navigation bar</p> <p>Note: This function is included to facilitate use of screen-reading software.</p>	
Skip links on header bar and tabs; move to end of navigation bar. Press <Tab> to move to first field or list on current screen.	<Ctrl><K> Or <Alt><F9>
<p>Switch between navigation bar and main frame (record or dialog box)</p>	
Move from navigation bar to record/ dialog frame Or move to navigation bar from record/ dialog frame	<Ctrl><Shift><Tab> (Internet Explorer) Or <Ctrl><Tab> (Netscape 7)

1.3 CatExpress: Action buttons (continued)

1.3 CatExpress: Action buttons

What are action buttons?

Action buttons appear at the top and bottom of the screen. Use action buttons to perform the following functions:

- Navigate among record display and editing screens
- Select display options for viewing and editing records
- Take cataloging actions

Action buttons vary, depending on the screen.

Summary of action buttons

Function	Action Buttons	What Button Does	Screen Where Found
Navigation	Back to Edit	Return to Catalog screen	Preview
	Left arrow	Previous record	Full record
	Right arrow	Next record	Full record
Display	Help Display	Enables display of popup Help for record fields	Catalog
	MARC Display	Shows full record with MARC tags (no textual field names)	Full record
	MARC Display OFF	Shows text boxes on Catalog screen with field names only (no MARC tags)	Catalog
	MARC Display ON	Shows text boxes on Catalog screen with field names and MARC tags	Catalog
	Preview	Goes to Preview screen	Catalog
	Text Display	Shows record with field names only (no MARC tags)	Full record

Function	Action Buttons	What Button Does	Screen Where Found
Cataloging actions	Cancel	Clears all fields and locations except holding library code (049) field and returns to full record screen	Catalog
	Clear fields	Clears all fields and locations except holding library code (049) field	Catalog
	Delete holdings	Goes to delete holdings screen	Full record
	Edit record	Goes to catalog screen	Full record
	Export only (interface users only)	Exports record to your local system without setting holdings	Full record, catalog, preview
	Fix error	Goes to catalog screen with red error message box and name of the field with error in red type	Cataloging error
	Record display	Goes to full record screen	Cataloging error, Cataloging successful
	Save to catalog	Goes to either cataloging error screen or cataloging successful screen	Full record, catalog, preview
	View label	View, edit, print label	Full record, catalog, preview

1.4 Set CatExpress options (continued)

1.4 Set CatExpress options

CatExpress users only You need to set CatExpress options only if:

- You are a CatExpress subscriber.
- Or you plan to use CatExpress for a portion of your copy cataloging.

Why set CatExpress options?

- Specify your preferred record view (MARC or Labeled).
- Specify a default call number type.
- Supply default information to streamline record editing:
 - Supply the holding library code you use most frequently.
 - Supply location information to be entered in field 852, subfield a.

Options for shared CatExpress authorizations

- Each CatExpress authorization has **one** set of default options stored on the CatExpress server.
- Users who share an authorization can establish a set of defaults for use by the group.
- Users who prefer different settings can modify the defaults after logging in and then click the **Save for Session** button to apply changes without affecting the group's shared settings.

How to set CatExpress options

	Action
1	Go to the CatExpress Options screen 1. On the General tab, under Admin Options, click Preferences . 2. At the Preferences screen, click Express Options . The Express Options screen appears.
2	Specify record view On the Express Options screen, under Default View, <ul style="list-style-type: none">• Select MARC to view bibliographic records with MARC tags, subfield codes, etc., to identify elements of record content. Or <ul style="list-style-type: none">• Select Label to view bibliographic records with descriptive labels for elements of record content. Default setting: MARC.

	Action
3	<p>Specify call number type</p> <p>On the Express Options screen, under Default Call Number,</p> <ul style="list-style-type: none"> • Select the type of call number you use most frequently: Dewey or LC (Library of Congress) or NLM (National Library of Medicine) or Local (local call number scheme or a local format for a standard scheme). Or • Select None if you want to select the call number type when editing each record. <p>Default setting: None.</p>
4	<p>Specify a label format</p> <p>On the Express Options screen, under Default Label Format, enter the label format you use most frequently.</p> <p>More information: See section 2.7, Print Labels.</p>
5	<p>Supply holding library code</p> <p>On the Express Options screen, under Default Holding Library Code, enter the holding library code you use most frequently.</p> <p>The system supplies your default holding library code. Verify that the appropriate code appears (change it if necessary).</p>
6	<p>Supply location information</p> <p>On the Express Options screen, under Default Location, supply the text you want to appear in Location (852 \$a) in bibliographic records.</p> <p>Notes</p> <ul style="list-style-type: none"> • Location maps to field 852 (Location/Call Number) in OCLC-MARC records. This field may be used to record local item information. Not all library local systems can use 852 information. Confirm whether your system accepts 852 before using this field. This is an optional field. • When editing records, you may leave some or all of the Location data entry boxes blank. However, if you enter data in any other data entry box in 852 (Location), then you must enter a Location (\$a) code.
7	<p>Change default or change for current session</p> <ul style="list-style-type: none"> • To use the CatExpress settings for the current session only, at the top or bottom of the Express Options screen, click Save for Session. • To use the settings for future sessions, click Save My Default.

Save changes, cancel, or restore original defaults

When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	<ul style="list-style-type: none"> • Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	<ul style="list-style-type: none"> • Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.

1.4 Set CatExpress options (continued)

Button	Purpose/Result
Reset	<ul style="list-style-type: none">• Restore original Connexion settings for options on this screen.• Reverse any changes you made during the current session or in previous sessions.
Cancel	<ul style="list-style-type: none">• Reverse any changes you made since you accessed this screen during the current session.• Your previously saved settings remain in effect.

**CatExpress reminders
for Connexion users**

If you use CatExpress for a portion of your workflow, this activity is billed on a per-transaction basis, at the same rate as Connexion activity.

1.5 Set CatExpress export options (continued)

1.5 Set CatExpress export options

- About export options**
- **Export method. CatExpress subscribers.** If profiled for CatExpress export, you export bibliographic records to a file on the Connexion server, and then download the file to your workstation.
 - **Records.** You export bibliographic records retrieved from WorldCat.
 - **Single record export.** With CatExpress, you export one record at a time.
 - **Format.** You export bibliographic records in MARC format.

Go to Export Options screen

	Action
1	On the General tab, click Admin .
2	At the Preferences screen, click Export Options .

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.
- The following table describes how the buttons work.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	Save changes on this screen for the current session only. When you log off, the system restores your previous default settings.
Save My Default	Save changes on this screen for the current session and future sessions. The new settings remain in effect until you change them.
Reset	Restore original Connexion settings for options on this screen. Reverse any changes you made during the current session or in previous sessions.
Cancel	Reverse any changes you made since you accessed this screen during the current session. Your previously saved settings remain in effect.

Set export options

Export files:

- Are created and stored on the Connexion server.
- **Allow appending until downloaded.** You can continue exporting to the same file until you download the file.
- Contain records that are exported either by any user from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file

type is **Institution**. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to **Individual**.

- Remain available for download for 30 days from the file creation date. After 30 days, the system automatically deletes export files.

	Action	Result or Note
1	<p>Export File Name (Optional). Specify a file name for downloaded export files.</p> <ul style="list-style-type: none"> • On the Export Options screen, under Export File Name, type the file name and extension in the File Name text box. • Or keep the default file name, export.dat. 	<ul style="list-style-type: none"> • Name specified. When you download an export file from the Download Export Files screen, the system automatically supplies the specified file name and extension. • Default name. If you do not specify a file name, the system supplies the default name, export.dat. • Change name or extension during downloading. If necessary, you can change the supplied file name before saving the file.
2	<p>Export File Type (Optional). Specify the type of export file to use.</p> <p>On the Export Options screen, under Export File Type, select Institution (default setting) or Individual.</p>	<p>If you select:</p> <ul style="list-style-type: none"> • Institution export file (default setting). Connexion creates export files that contain records exported by anyone logged on with an authorization number linked to your library's OCLC symbol. • Individual export file. Connexion creates export files that contain records exported by a user logged on with a specific authorization number.
3	<p>Fields to Delete on Export (Optional) Specify the fields you want to remove from each bibliographic record before exporting the record for local use.</p> <p>On the Export Options screen, under Fields to Delete on Export, type the 3-digit MARC tag numbers for the fields to delete.</p>	<ul style="list-style-type: none"> • To delete a single field, type the tag number in the text box. • To delete a range of fields, type the first and last tag to be removed, separated by a hyphen. • Separate single tags and tag ranges with commas. <p>Example: In the Fields text box, type 920, 938, 945-999 to remove fields 920 and 938, and fields 945 through 999, from all exported bibliographic records.</p>

Related topics

1.6 Customize the system interface (continued)

1.6 Customize the system interface

Notes to CatExpress users

OCLC Connexion browser is the cataloging system of which CatExpress is a part. CatExpress operates within the Connexion environment, so you use Connexion to access and use CatExpress. Most interface customization options for Connexion apply to CatExpress.

However, some options relate to advanced cataloging functions of Connexion that are not available to CatExpress subscribers.

Go to Interface Customization screen

	Action
1	On the General tab, under Admin Options, click Preferences .
2	At the Preferences screen, click General Options .
3	On the General Options screen, click Interface Customization Options .

Save changes, cancel, or restore original defaults

When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	<ul style="list-style-type: none">• Save changes on this screen for the current session only.• When you log off, the system restores your previous default settings.
Save My Default	<ul style="list-style-type: none">• Save changes on this screen for the current session and future sessions.• The new settings remain in effect until you change them.
Reset	<ul style="list-style-type: none">• Restore original Connexion settings for options on this screen.• Reverse any changes you made during the current session or in previous sessions.
Cancel	<ul style="list-style-type: none">• Reverse any changes you made since you accessed this screen during the current session.• Your previously saved settings remain in effect.

1.6 Customize the system interface (continued)

Show or hide tabs for Connexion services

	Action
1	<p>On the Interface Customization screen, find the section labeled Select Service Tabs for Navigation Bar.</p> <ul style="list-style-type: none"> This section lists all Connexion services available to you based on your authorization and on your subscriptions to additional services. A check box appears before each service name. <p>Default setting: All available services are selected (check marks appear in all check boxes).</p>
2	<p>Show or hide tabs for services</p> <ul style="list-style-type: none"> Show a hidden tab. Click the empty check box in front of the service name. A check mark appears in the box. Hide a visible tab. Click the check box in front of the service name. The check mark disappears.
3	Save changes as default or use for current session only.

Show or hide specific options on a tab

	Action
1	<p>On the Interface Customization screen, find the section labeled Select Service Tabs for Navigation Bar.</p> <p>This section lists all Connexion services available to you based on your authorization and on your subscriptions to additional services.</p>
2	<p>To select specific options, Options lists, or buttons to show or hide on a tab, in the list of service tabs,</p> <p>Click the hyperlinked service name for the tab you want to customize.</p> <p>The system displays a screen that lists available options and lets you specify exactly which options appear on the tab.</p> <p>Note: Service name not hyperlinked If a service name is not hyperlinked, option selection is not yet available for that service tab.</p>

Add a scroll bar to the navigation bar

	Action
1	<p>Scroll Bar</p> <p>On the Interface Customization screen, find the section labeled Scroll Bar on Navigation Bar.</p> <p>Select the appropriate option button.</p> <ul style="list-style-type: none"> Click Display If Needed to add a horizontal scroll bar to the navigation bar only if required due to changes in screen size or resolution. Click Always Display to provide a horizontal scroll bar at all times. <p>Default setting: Display If Needed.</p> <p>Note: Adding a scroll bar removes the More tab from the navigation bar.</p>
2	Save changes as default or use for current session only.

1.6 Customize the system interface (continued)

Use optimized images in Connexion interface

- The Optimize Images setting lets you determine whether Connexion displays interface elements as standard **.gif** images or as pixel-mapping tables that resemble images. In most cases, using pixel-mapping tables allows the browser to display screens faster, improving system response time.
- Keep the default setting (**On**) for better browser performance when using Connexion.
- Select the **Off** setting **only** if browsing is consistently slower when optimization is turned on. Before turning optimization off, contact OCLC Customer Support for assistance in diagnosing performance problems.

Notes:

- Image optimization works with supported Windows versions of Internet Explorer. This functionality is **not available** for Netscape browsers or on an Apple Macintosh computer.
- If you select **Large Tab Images** to enlarge the navigation bar, optimized images are not used.

Enlarge tabs and text on the navigation bar

	Action
1	<p>Large tab images and text</p> <p>On the Interface Customization screen, find the section labeled Size of Tab Images and Text in Navigation Bar.</p> <p>Select the appropriate option button.</p> <ul style="list-style-type: none">• Click Large Tab Images to use tabs and text larger than those the system automatically provides.• Click Standard Tab Images to use standard tab and text sizes for your screen resolution. <p>Default setting: Default Tab Images. The system automatically sizes the navigation bar based on screen resolution.</p>
2	Save changes as default or use for current session only.

Add a Go button to the navigation bar

Purpose. Add a Go button to provide a keyboard-only method of navigating via the Options lists.

How it works

- **With Go button.** When the navigation bar includes a Go button, navigating via Options lists requires 2 steps. First, select the list item. Then use the Go button to complete the selected action.
- **Without Go button.** With the Go button hidden (the default setting), when you select a list item, the system does the selected action immediately.

1.6 Customize the system interface (continued)

	Action
1	On the Interface Customization screen, find the section labeled Show or Hide Go Button .
2	Select the appropriate option button. <ul style="list-style-type: none"> Click Show to add a Go button to the right of the Options lists on the active tab. Click Hide to display the Options lists without a Go button. <p>Default setting: Hide. Go button does not appear on the navigation bar.</p>
3	Save changes as default or use for current session only.

Use the Go button with Options lists

Go button off. If you did not add a **Go** button,

- **Keyboard.** Press the shortcut key for the Options list (see table). Then press <down-arrow> once to select the first item on the list.
- **Note:** Without a Go button, you cannot use the keyboard to select any item on the Options list; only the first item is accessible.
- **Mouse.** Open the list, point to the item you want, and click once to select the item.

Go button on. If you added a **Go** button,

- **Keyboard.** Press the shortcut key for the Options list (see table). Then press <down-arrow> one or more times to select the item you want. Then press <Enter> to take action (if you have not moved the cursor from the Options list). Or press <Alt><8> to take action (if you moved the cursor to a position in the lower frame of the screen).
- **Mouse.** Open the Options list, point to the item you want, and click to select the item. Then click **Go**.

Options list (on active tab)	Keystroke
Search Options	<Alt><!>
Browse Options Not on Express tab Or Admin Options on General tab	<Alt><@>
Create Options Not on Express tab	<Alt><#>
Show Options Not on Express tab	<Alt><\$>
Other Options Express tab only	<Alt><%>

1.6 Customize the system interface (continued)

Show or hide OK/Cancel prompts for record actions

- This option applies to selected actions for bibliographic records and authority records.
- Your setting for this option does not affect some actions, which always require you to respond to an OK/Cancel prompt. These actions include: Delete Constant Data Record, Delete Save File Record, Delete Holdings, and Report Error.

	Action
1	On the Interface Customization screen, find the section labeled Show or Hide OK/Cancel Messages .
2	<p>For Final Actions and Editing Actions, select the appropriate option button.</p> <ul style="list-style-type: none"> • Click Yes to have Connexion prompt you to approve or cancel before executing requested actions. • Click No to have Connexion execute requested actions without prompting you for an OK or Cancel response. • Final actions included: <ul style="list-style-type: none"> — Produce and Update Holdings — Replace and Update Holdings — Replace Record (bibliographic records only) — Submit to Nat'l Review File — Update holdings • Editing actions included: <ul style="list-style-type: none"> — Cancel Changes — Control All Headings and DDC — Derive New Constant Data Record — Derive New Record — Lock Master Record — Release Record Lock — Set as Default Constant Data — Unedit Record <p>Default setting: Yes for both options. Before executing final actions and editing actions, Connexion prompts you to respond with OK to proceed or Cancel to cancel the action.</p>
3	Save changes as default or use for current session only.

1.6 Customize the system interface (continued)

Show or hide logoff warning for active records

	Action
1	On the Interface Customization screen, find the section labeled Show or Hide Logoff Warning .
2	Select the appropriate option button. <ul style="list-style-type: none">• Click Show to have the system warn you, before ending your session, that records remain open in edit mode.• Click Hide to prevent the system from displaying the logoff warning for records in edit mode. <p>Default setting: Hide. The system ends the session immediately. The system does not check for active records. No warning screen appears.</p>
3	Save changes as default or use for current session only.

Show or hide quick tips

	Action
1	On the Interface Customization screen, find the section labeled Show or Hide Quick Tips .
2	Select the appropriate option button. <ul style="list-style-type: none">• Click Show to see all available tips on all Connexion screens.• Click Hide to hide all tips on all Connexion screens. <p>Default setting: Show. Any available tips appear on all Connexion screens.</p>
3	Save changes as default or use for current session only.

View diacritics and special characters while editing

- **Option applies to edit views only.** In display views, Connexion always displays the typographic forms of diacritics and special characters.
- **CatExpress users** should accept the default setting.

	Action
1	On the Interface Customization screen, find the section labeled Diacritics and Special Characters in Edit View .
2	Select the appropriate option button. <ul style="list-style-type: none">• Click Display Diacritic or Character to see the correct typographic forms of diacritics and special characters.• Click Display Bar Syntax to view the bar syntax representations for diacritics and special characters in the ALA character set. <p>Default setting: Display Diacritic or Character.</p>
3	Save changes as default or use for current session only.

1.6 Customize the system interface (continued)

Set options for the session inactivity timer

	Action
1	<p>On the Interface Customization screen, find the section labeled Session Timer Options.</p>
2	<p>Specify minutes of inactivity before automatic logoff.</p> <p>At the option labeled Inactivity Countdown Timer, open the list and select the number of minutes you want. You can specify from 10 to 40 minutes, in 1-minute increments.</p> <p>Default setting: 40 minutes. The system automatically ends a session after 40 minutes of inactivity.</p> <p>Note: Not for Dewey-only sessions. The option to shorten the inactivity timeout is not available for Dewey Services-only sessions. It is not needed because Dewey-only sessions do not incur access and user support fees or count against simultaneous-session limits.</p>
3	<p>Display of countdown timer</p> <p>At the option labeled Inactivity Countdown Timer, select the appropriate option button.</p> <ul style="list-style-type: none"> • Click Display in Header Bar to place the digital countdown timer on the header bar above the navigation bar. • Click Display in Status Bar to place the digital countdown timer on the status bar at the bottom border of the browser window. • Click Hide to hide the digital countdown timer. <p>Default setting: Display in Status Bar. The countdown timer appears on the status bar at the bottom border of the browser window.</p>
4	<p>Timeout warning</p> <p>At the option labeled Timeout Warning, set the following items:</p> <p>Specify when to display a timeout warning.</p> <p>From the list, select how many minutes in advance of automatic logoff you want to see a warning message. You can specify from 1 minute to 9 minutes, in 1-minute increments.</p> <p>Default setting: 5 minutes.</p> <p>Control whether, and where, the timeout warning appears.</p> <p>Select the appropriate option button.</p> <ul style="list-style-type: none"> • Click Do Not Display to turn off the timeout warning. • Click Display in Navigation Bar Area to have the system present a timeout warning message in the navigation bar. • Click Display in Popup Window to have the system display a timeout warning message in a separate window on top of other open windows. <p>Default setting: Display in Navigation Bar Area. The timeout warning appears in the navigation bar.</p>

1.6 Customize the system interface (continued)

	Action
5	<p>Specify what happens when session timeout occurs. At the option labeled When Timer Expires, select the appropriate option button.</p> <ul style="list-style-type: none">• Click Display Logoff Screen to have the system display the logoff screen that lists the time you logged on, the time you logged off, and the duration of your session. At the bottom of the logoff screen is a link to the logon screen, so that you can log on again conveniently.• Click Keep Current Display to have the system end the session at the screen you last used. This can help you resume work efficiently. However, if you select this option, you will not see the logoff screen that reports your session duration. <p>Note: The system cannot retain the current display after logoff if you specify a timeout interval under 40 minutes (when the server ends an inactive session). To end a session after a shorter inactive period, the system uses a logoff command, which always displays the logoff screen.</p>
6	Save changes as default or use for current session only.

About the session timer and inactivity timeout

Inactivity timeout

- The inactivity timer ends a session automatically after a period of no interaction with the server.
 - For cataloging sessions, 40 minutes of inactivity is the default setting.
 - For Dewey Services-only sessions, the default inactivity timeout is 120 minutes.
- For cataloging sessions, you can specify automatic logoff after as little as 10 minutes of inactivity. This setting uses a timer monitored by the browser. If you close the browser without logging off, the 40-minute inactivity period monitored by the server is in effect. However, the automatic logoff function (on by default) ends the session when the browser closes.

Not for Dewey-only sessions. The option to shorten the inactivity timeout is not available for Dewey Services-only sessions. It is not needed because Dewey-only sessions do not incur access and user support fees or count against simultaneous-session limits.
- The inactivity timer prevents a session from remaining open indefinitely (and incurring access and user support fees) after a user stops working but neither logs off nor closes the browser. Specifying a shorter inactivity timeout further reduces the potential for problems caused by unused sessions.

Why unexpected timeouts can occur

- The system cannot recognize activity that does not involve interaction with the server.

1.6 Customize the system interface (continued)

- When you edit or type in a text box, for example, you are working locally: changes occur on the displayed screen, but you do not interact with the server. The system does not recognize these changes as activity until you take an action that involves the server; for example: starting a search or browse, selecting a record from search results, saving a user note, etc.
- If you spend more than 40 minutes working locally without taking an action that requires interacting with the server, the inactivity timer may log you off.

Prevent unexpected timeouts

- **Timer display.** Check the time remaining before a timeout on the digital timer display. You can locate the countdown timer on the header bar or on the status bar. The display shows the number of minutes and seconds remaining before an inactivity timeout will occur. For cataloging sessions, the timer counts down from 40 minutes (or an interval of 10 to 40 minutes you specify) until you interact with the server (120 minutes for Dewey-only sessions). After each interaction, the timer resets and counts down again until the next interaction.
- **Timeout warning.** The system automatically warns you 5 minutes before a session is about to expire due to inactivity. You can specify that the warning appear from 1 minute to 9 minutes before the session will expire. And you can have the message appear in a pop-up box (instead of in the menu area or the Connexion screen) to make it more noticeable.
- **More frequent interaction.** While working, periodically take an action such as switching screens, moving between records and a results list, etc. Make a habit of interacting every few minutes, just as you make a habit of saving your work often while using desktop software.

Automatic logoff on browser close

- This option controls the Connexion function that automatically ends a session when you close your browser.
- After automatic logoff, you incur no access and support charges for the session, and the session does not count against simultaneous logon limits if you subscribe to Flat Fee Internet access or Dedicated TCP/IP access.
- Keep the default setting for this option unless it causes a problem.
- Before changing the setting, contact OCLC Customer Support for assistance. CSD staff can verify that automatic logoff functionality is causing the problem you have and, if necessary, help you select the best automatic logoff setting for your workstation, operating system, and browser configuration.

1.6 Customize the system interface (continued)

	Action
1	<p>Automatic logoff option On the Interface Customization screen, find the section labeled Automatic Session Logoff on Browser Close.</p> <p>Keep the default setting</p> <ul style="list-style-type: none"> • On - Use default method for your browser. With the default setting selected, your Connexion session is logged off automatically when you close your browser. • After automatic logoff, you incur no access and support charges for the session, and the session does not count against simultaneous logon limits if you subscribe to Flat Fee Internet access or Dedicated TCP/IP access. <p>Change setting OCLC recommends that you use the default setting unless you are advised to change it by Customer Support staff.</p> <ul style="list-style-type: none"> • Select Off - Do not log off when browser window is closed if you do not want your Connexion session logged off automatically when you close the browser. • Select Always use session monitor window if your session remains active after you close the browser window, indicating that the default automatic logoff method does not work for your browser. With this option, a small session monitor window opens in the background when you log on. The window detects when you close the main browser window, resulting in automatic logoff.
2	Save changes as default or use for current session only.

No automatic logoff (not recommended)

- If you turn off the automatic logoff function, closing the browser does not end a session. The session remains active until the Connexion server ends it after 40 minutes of inactivity.
- **Note:** Setting a shorter inactivity timeout period via the **Session Timer** option does not work to end a session after you close the browser. The browser, not the Connexion server, monitors inactivity intervals less than 40 minutes.
- When a session remains open, the system treats that session as a regular user session. The open session counts against simultaneous logon limits for libraries that subscribe to Flat Fee Internet access or Dedicated TCP/IP access. You (or others from your institution) may be unable to log in again until an inactivity timeout ends the “lost” session.
- OCLC Customer Support staff can end the active session.

Change background color

If you find the default white background of interface screens uncomfortably bright, you can choose a light blue background.

1.6 Customize the system interface (continued)

	Action
1	On the Interface Customization screen, find the section labeled Background Color .
2	Select the appropriate option button. <ul style="list-style-type: none">• Click Light Blue to use a light blue background on Connexion screens.• Click White to use the default white background. Default setting: White.
3	Save changes as default or use for current session only.

Related topics

1.6 Customize the system interface (continued)

1.6 Customize the system interface (continued)

Search and Catalog

In this chapter

This chapter contains the following topics:

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2.1 CatExpress: Basic search

Basic searching

Use the Basic Search screen to search for items by standard number, keyword, or title.

To search other indexes, use the Advanced Search screen. On the navigation bar, under Search Options, click **Advanced**.

How to search

	Action	Result or Note
1	On the Basic Search screen, select the type of search you want.	Click to select Standard Number or Keywords or Title Phrase
2	In the Search for box, type a number, word(s), or title to find the records you need.	Examples: Standard Number search: 0043-5651 Keyword search: elizabethan Title Phrase: one tank trips
3	Optional: Limit search by Language of Cataloging To limit results to records in your preferred language of cataloging, use the Apply Language of Cataloging Limiter check box (below the search entry box and index selection area). Click to select the check box and then choose one of 11 languages from the list.	The system retrieves only records in the language you specified.
4	Click Search .	The Search Results screen appears (if only one item is found, the Full Record screen appears).

Standard number searches

Type of search	Number on item	Type	Guideline
ISBN	1-565-9200-5 0-33002468-X	156592005 033002468X	Omit hyphens, but retain final X.
ISSN	0043-5651	0043-5651	Retain hyphen
LC Control Number	86-3211 map32-14	In:86-3211 In:32-14	Omit prefix. Retain the hyphen to get the most complete results. Precede the number with the index label nl : (l is the lowercase letter el).

Stopwords

If you type a stopword along with valid words in a search, the system ignores the stopword and processes the search. If your search includes only stopwords, you receive an error message.

2.1 CatExpress: Basic search (continued)

&	be	have	it	their
a	but	he	its	there
an	by	her	not	this
and	for	his	of	to
are	from	if	on	was
as	had	in	or	were
at	has	into	she	when
		is	so	which
			than	with
			that	would
			the	you

2.2 CatExpress: Advanced search

Advanced searching Advanced searching allows you to search more indexes and lets you search for multiple terms. Always limit your search to increase precision. **All** means no limit has been chosen.

How to search

	Action	Result or Note
1	Type one or more search terms in the first Search for box. You can combine them using And, Or, Not .	Using And, Or, and Not helps refine the search but is not necessary for performing an accurate search.
2	From the list to the right of the Search for box, select the index in which you expect to find your terms.	The Music Publisher index contains record label numbers, publisher numbers for scores, and publisher numbers for videorecordings.
3	Enter search terms in the second or third Search for box if needed.	
4	Select indexes appropriate for any search terms you entered in the second or third Search for box.	
5	Select an operator (And, Or, Not) to combine the search terms entered in the second or third boxes.	
6	Select Automatic Sort options (author, title, or date) in the order you want the Search Results sorted. If you select more than one sort option, your results are sorted by the option in the top list, then by the option in the middle one, and last by the option in the bottom one.	If there are more than 200 search results, they are not sorted. Ascending sorts from low to high (A-Z; 1,2, etc.). Descending sorts from high to low (Z-A, 9,8, etc.).
7	To Limit Search by Date , see the next section	The Date limit lets you retrieve records for items published in a specific year or range of years.
8	To limit results to records in your preferred language of cataloging, use the Apply Language of Cataloging Limiter check box (directly below the search entry area). Click to select the check box and then choose one of 11 languages from the list.	The system retrieves only records in the language you specified.
9	Select Limit Search by Record Format to limit results by type of material.	All indicates that no format has been chosen. You can select any of the standard MARC formats.
10	Select Limit Search by Language if you want to retrieve only records for items in a specific language.	All indicates that no limit has been chosen.

2.2 CatExpress: Advanced search (continued)

	Action	Result or Note
11	Select Limit Search by Internet to specify whether you want to retrieve records for Internet resources.	All indicates that no limit has been chosen. Internet retrieves only internet resources. Non-Internet excludes internet resources.
12	Optional. Click Clear Search to clear everything you have typed or selected.	
13	Click the Search button.	The Search Results screen displays. Optional. Select Sort Order from the Actions list to sort search results.

Limit searches by date (year of publication)

To search for	Type	Example	Result
A specific year	The year	1994	Retrieves items published in year typed.
Items within a decade	The millennium, century, decade and question mark	199?	Retrieves items published in decade
Items after a certain date	Start date and hyphen	1994-	Retrieves items published in year typed in addition to those published after it
Items before a certain date	Hyphen and end date	-1994	Retrieves items published in year typed in addition to those published before it
Items within a date range	Start date, hyphen, and end date	1994-1997	Retrieves items published in both years and all intervening years

Tips for selecting indexes

To select an index from the list, type the first letter of the name of the index you want. When multiple index names start with the same letter, press that letter key until the one you want appears.

Example: Selecting the Government Document Number index:

	Action
1	Click in the list to highlight it.
2	Press <G> once and Genre/Form displays.
3	Press <G> again and GovDoc Number appears.

Searching Dewey, LC, and NLM call numbers

When you search for Dewey Decimal, Library of Congress, and National Library of Medicine call numbers, make sure to:

2.2 CatExpress: Advanced search (continued)

- Include decimal points
- Delete all other punctuation
- Delete spaces

Note: The system searches for these numbers in the subfield \$a portion of the 050, 060, 082, 090, 092, 096 fields.

Example. To search for Library of Congress call number (lc:) M357.4, type:
m357.4

Retained searches

Everything you have typed or selected when searching is retained until you change it. This allows you to correct or refine searches.

Clear searches

Click **Clear Search** to clear either the last search or everything you have typed or selected.

Searching with index labels

Each search type has a 2-letter index label. You can type the label, including a colon (an equal sign for the Title Phrase index **ti=**) before your search term or select the desired index from the list. Do not type a space between the colon (or equal sign) and the search term. If you type an index label preceding a term, CatExpress ignores the index name selected in the list.

Example. bn:: is the index label for the ISBN search.

Search	Result
bn:0061057320	Bibliographic record for <i>Black Light</i> by Elizabeth Hand

You **must** type the index labels in lowercase letters. You can type search terms in upper or lowercase letters, or a combination. Below is a list of all index labels for CatExpress advanced searches. Some searches are narrower than others, resulting in fewer matches. Where there are 2 labels, the narrower search appears first.

2.2 CatExpress: Advanced search (continued)

List of index labels

Index	Index label
Author	au:
Corporate/Conference Name	cn:
Dewey Call Number	dd:
Genre/Form	ge:
Gov Doc Number	gn:
ISBN	bn: or sn:
ISSN	in: or sn:
Keywords	kw:
LC Call Number	lc:
LC Control Number	ln: or sn:
Publisher Number	mn:
NLM Call Number	lm:
Notes	nt: or kw:
OCLC Number	no:
Personal Name	pn: or au:
Publication Location	pl:
Publisher	pb:
Report Number	rn:
Series Name	se:
Standard Number	sn:
Subject Words	su: or kw:
Title	ti:
Title Phrase	ti=
Uniform Title	ut:

Searching for hyphenated terms

The way you search for hyphenated terms depends on the index you are searching. The table below describes how to search for hyphenated terms.

Index	Search
Title (ti:)	with the hyphen, as one word
Notes (nt:)	or
Subject Words (su:)	without the hyphen, as separate words
All other indexes	with the hyphen, as one word

Hyphenated search examples

To search for	In index	Type
Ben-Gurion	Title (ti:)	ben-gurion ben gurion ben gurion
Wolf-Ferrari	Notes (nt:)	wolf-ferrari wolf ferrari wolf ferrari

2.2 CatExpress: Advanced search (continued)

To search for	In index	Type
Aberdeen-Angus	Subject Words (su:)	aberdeen-angus aberdeen angus aberdeen angus
Baskin-Robbins	Publisher (pb:)	baskin-robbins

2.3 CatExpress: Search results

No search results If a search retrieves no results, the Advanced Search screen appears so you can revise your search.

Sorting search results At the right side of the screen, above the list of records retrieved, open the Action/Sort list.
Select **Sort by Author** or **Sort by Title** or **Sort by Sort by Descending Date** or **Sort by Main Entry**.
Note: Sorting is only available with results of 200 or fewer items.

If a record is not found CatExpress retrieval may be affected by database maintenance, as well as creation and modification of bibliographic records. If you cannot find a matching record, wait a day or 2 and try again.

National library records The table below lists the national libraries whose records are identified by an abbreviation on the Search Results screen.

Abbreviation	National library
CYT	National Central Library of Taiwan
GPO	U.S. Government Printing Office
LC	Library of Congress
NAL	National Agricultural Library
NLC	Library and Archives Canada
NLM	National Library of Medicine
PCC	Program for Cooperative Cataloging
UKM	British Library

View one record If a search retrieves only one record, it is displayed immediately (the Search Results screen does not appear). When multiple records are retrieved, they are displayed on the Search Results screen. Use the procedure below to view one record:

	Action	Result
1	Click the title of the record you want.	The Full Record screen appears.
2	Click Edit Record to begin the cataloging process. Or If the record requires no editing, click Save to Catalog to attach your default holding library code.	The Catalog screen appears. Note: Depending on the size of your record, you may need to scroll down to view it all.

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.

2.3 CatExpress: Search results (continued)

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>.
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, Resource Catalog, click Search Results .

Guidelines for selecting records

Use the following guidelines to determine if the record you are viewing matches the item that you are cataloging:

- **Standard Numbers.** Because standard numbers (ISBN, ISSN, LCCN) are used as unique identifiers, the presence of the same standard number on the item you are cataloging and the record you have found strongly indicates a match.
- **Edition.** Edition statements in titles should match. Different editions are different records. If editions do not match, the record is **not** a match.
- **Physical description (Format).** The dimensions and other physical characteristics should match. If physical description is different, the record is **not** a match. For example, a CD and a cassette tape are different records, even if they have the same title and are issued by the same publisher.

2.3 CatExpress: Search results (continued)

- **Publishers.** Publishers should match. If the title is the same and the publishers are different, the record is **not** a match.
- **Notes.** Notes often highlight distinctions among similar items. Check notes for descriptions of distinctive characteristics of an item to help determine a match.
- **Library of Congress cataloging.** Many libraries prefer records created by the Library of Congress. If **LC** appears after the title of the item on the Search Results screen, the record was created by the Library of Congress or another library participating in the Program for Cooperative Cataloging (PCC).

2.4 CatExpress: Cataloging basics

Determine holdings Use the following table to decide whether your library holds the item. You cannot check the holdings of libraries other than your own.

If	Then
Ownership (the first line in the record) reads Holdings in [OCLC institution symbol]- [#] other holdings	Your OCLC symbol is attached to the record in WorldCat. This indicates that you may already have a record for the item. Follow local guidelines.
Ownership (the first line in the record) reads Holdings in [OCLC institution symbol]/Local [OCLC institution symbol] holdings - [#] other holdings	Your OCLC symbol is attached to the record in WorldCat. And your library has also created at least one local holdings record (LHR) to describe detailed holdings for the item. This indicates that you may already have a record for the item. Follow local guidelines.
Ownership (the first line in the record) reads No holdings in [OCLC institution symbol]- [#] other holdings	Your OCLC symbol is not attached to the record in WorldCat. You may need the record. Follow local guidelines.
Note: If you have holdings set on the record, Holdings in [OCLC institution symbol] will appear on the record on the search results screen.	

Delete holdings Check local guidelines for policies about deleting holdings.

	Action	Result
1	From the Full Record screen, click Delete Holdings . Note: Delete Holdings only appears if your institution holds the item.	The Delete Holdings screen appears.
2	Click Yes .	The Delete Holdings Success screen appears.

Transaction code for Delete Holdings Records whose holdings have been deleted may be included in your file of downloaded records, depending on your MARC Subscription options. Libraries usually want to avoid adding these records to their local systems.

The records contain a code (represented by a hexadecimal number) indicating that holdings have been deleted; many local systems use such codes to remove unwanted records when loading MARC record files.

In OCLC MARC Subscription records, the transaction type is identified in field 994, subfield a. Field 994 subfield b contains the OCLC symbol involved (for Delete Holdings, the symbol deleted).

Example: \$03\$bCSL

In this example, the transaction is Delete Holdings.

2.4 CatExpress: Cataloging basics (continued)

Transaction codes:
02 = Update Holdings
03 = Delete Holdings

The hexadecimal codes are documented in *OCLC-MARC Records*, chapter 5: Character set, section 5.1, in a paragraph titled **Hexadecimal codes**.

Local holdings records

If your library creates local holdings records, you may have LHRs attached to the bibliographic record when you delete your holdings. The system deletes your LHRs as well as your holdings from the record. Follow local guidelines when deleting holdings.

Status of holdings

All changes to Ownership (holdings) take effect and can be viewed immediately. If you make a mistake while cataloging a record (thus adding your holdings to a record), you can retrieve the record and edit it or delete your holdings at any time.

MARC and text displays (Full Record screen)

On the Full Record screen, you can view the record in MARC format or with text-only field labels.

	Action	Result
1	Click MARC Display .	The record appears with MARC tags instead of text labels. MARC Display changes to Text Display .
2	Click Text Display .	The record appears with text-only field labels instead of MARC tags. Text Display changes to MARC Display .

Note: The display option you select will persist until you log off, unless you change it.

MARC or plain text field names (Catalog screen)

On the Catalog screen, you can view the data entry boxes with text-only field names or add MARC element names to the field name.

	Action	Result
1	Click MARC Display ON .	Names for data entry boxes include MARC tags as well as text. MARC Display ON changes to MARC Display OFF .
2	Click MARC Display OFF .	Names for data entry boxes are text-only, without MARC tags. MARC Display OFF changes to MARC Display ON .

Note: The display option you select will persist until you log off, unless you change it.

Help for fields (data entry boxes) on Catalog screen

- **Basic help.** On the Catalog screen, click **Help Display** to make basic field help available when needed. Then hover the mouse pointer over the name of a field. A definition of the data to be entered in that box appears in a popup window. When you click **Help Display**, the button changes to **Help Display OFF**

2.4 CatExpress: Cataloging basics (continued)

- **Detailed help.** When you need more information on a field or detailed guidance on data entry, click the hyperlinked name of the desired field. A new browser window opens to display the section from *OCLC Bibliographic Formats and Standards* that describes the selected field and explains its use.

Show or hide data entry areas

The Catalog screen provides four data entry areas. One area, for the OCLC Holding Library Code, always appears because the holding library code is required in every record. The other areas are optional. If desired, you can hide any optional area that you do not use. Hiding unnecessary entry areas makes the Catalog screen shorter and simpler.

Action	Procedure
Hide a visible data entry area	Click the minus-sign button on the right side of the entry area, next to the up/down arrow buttons. Result The text boxes disappear and the entry area shrinks to a single line.
Show a hidden entry area	Click the plus-sign button on the right side of the hidden entry area, next to the up/down arrow buttons. Result The full entry area reappears.

Catalog an item

The data you enter on the Catalog screen is added to the information already present in the record. This means, for instance, that if the record already has a Summary Note (520) field, you do not need to re-enter the note on the Catalog screen.

If you do add a field, such as the Price (020 \$c) or the Summary (520), it does not replace the field already in the record. The new field is added in addition to the existing fields.

Your local system and guidelines determine whether you should edit the data on the Catalog screen or edit in your local system.

The only field you **must** complete is the OCLC holding library code (049) field.

2.4 CatExpress: Cataloging basics (continued)

	Action	Result
1	From the Full Record screen, click Edit Record .	The Catalog screen appears. Note: Scroll down to view the rest of the screen and the record at the bottom.
2	Type information in data entry boxes according to local practice. Use the mouse or <Tab> to move between boxes.	The data you type appears in the data entry boxes. Enter key: Do not press <Enter> to move the cursor. <Enter> has the same effect as Save to Catalog in Internet Explorer. (It has no effect in Netscape Navigator.) Note: The OCLC holding library code must be 4 characters. If you add a call number, you must select a call number type.
3	Optional: Click Preview to view the data you have added.	The Preview screen appears, which lists all the data you have added.
4	Click Save to Catalog when you are finished.	The Cataloging Successful screen displays the message, "Record Successfully Cataloged."

Setting holdings on locally edited records

If you edit your records on your local system and have set your institution's default holding library code, you may set holdings on the record screen without going to the catalog screen by clicking **Save to Catalog**.

Export record (add to export file)

Each time you click **Export only** (interface users) or **Save to Catalog** (subscribers or interface users) the current record is added to your export file.

Important: If Electronic MARC Subscription is the primary record delivery mechanism, export is not available.

Action	Result
From the Full Record, Catalog, or Preview screen: Subscribers: or interface users click Save to Catalog Interface users: click Export only	The Cataloging Successful screen displays the message: Item successfully cataloged. You now have (n) record in your export file. Please select Download Export Files to retrieve exported records.

Recataloging a record

If you have recataloged a record, another copy appears in your file of downloaded records.

Search and catalog another item

After you catalog an item, you can repeat the cataloging process by clicking **Basic** or **Advanced** under Search on the Express tab.

2.4 CatExpress: Cataloging basics (continued)

Validation errors If the record has validation errors, the Cataloging Error screen appears with validation error messages. Switching to the MARC display may help you diagnose validation errors.

Reporting errors Some records you find may have errors. CatExpress does not allow you to correct them. This validation process checks and allows corrections only on data that you enter on the Catalog screen. You can, however, report errors by filling out the forms below on the OCLC web site.

WorldCat Record Change Request

at: < <https://www3.oclc.org/app/bibchg/> >

WorldCat Duplicate Record Merge Request

at: < <https://www3.oclc.org/app/bibdup/> >

2.5 CatExpress: Add local data

Basic data entry

Use the following techniques to add data to boxes:

- Use the mouse to place the cursor in the box to which you want to add data.
- Click the arrows on the list boxes and select from the lists.
- Press <Tab> to move the cursor from box-to-box.

Warning: Holding library code required

The system automatically displays the default OCLC holding library code (found on the Express Options screen and based on your profile) in the data entry box labeled OCLC holding library code. Make sure this holding library code is the correct one for your workflow.

Show or hide data entry areas

The Catalog screen provides four data entry areas. One area, for the OCLC Holding Library Code, always appears because the holding library code is required in every record. The other areas are optional. If desired, you can hide any optional area that you do not use. Hiding unnecessary entry areas makes the Catalog screen shorter and simpler.

Action	Procedure
Hide a visible data entry area	Click the minus-sign button on the right side of the entry area, next to the up/down arrow buttons. Result The text boxes disappear and the entry area shrinks to a single line.
Show a hidden entry area	Click the plus-sign button on the right side of the hidden entry area, next to the up/down arrow buttons. Result The full entry area reappears.

Call number entry

You can enter a Dewey call number, Library of Congress call number, a National Library of Medicine call number, or a local call number in records.

	Action	Result
1	Place the cursor in Call Number Class . Type the class part of the call number.	The class part of the call number appears as you type.
2	Place the cursor in Cutter . Type the Cutter part of the call number.	The Cutter number appears as you type.
3	Click the arrow in the Type box.	Select a type from the list. Note: Once you choose a call number type, it persists until logoff, unless you choose another type.

2.5 CatExpress: Add local data (continued)

Action buttons on the Catalog screen

Action button	Description
Cancel	Click to clear all fields and locations except the holding library code (049) field and return to the Full Record screen.
Clear Fields	Click to clear all fields and locations except the holding library code (049) field.
Export Only*	Adds record to your export file (without setting holdings) * Export Only button available only for interface users.
Help Display	Click the button and then hover the mouse pointer over the label next to any data entry box. A definition of the data to be entered in that box appears in a popup window. When you click Help Display , the button changes to Help Display OFF . Note: Your selection persists until you log off, unless you change it.
MARC Display OFF	Shows text labels only (no OCLC-MARC tags or codes) for data entry boxes. When you click MARC Display OFF , the button changes to MARC Display ON . Note: Your selection persists until you log off, unless you change it.
MARC Display ON	Adds OCLC-MARC elements to the text labels for data entry boxes. When you click MARC Display ON , the button changes to MARC Display OFF . Note: Your selection persists until you log off, unless you change it.
Preview	Click to view a list of fields to which you added data. If necessary, scroll down to view all changes. Click Back to Edit to return to the Catalog screen.
Save to Catalog	Click to complete the work on the record for your local system. Your edits are in the copy of the record you receive in your MARC Subscription file or (if profiled for export) your export file. After you click Save to Catalog , the system displays the message Record Successfully Cataloged . Save to Catalog also attaches your OCLC symbol to the bibliographic record in WorldCat.
View Label	Click to view, edit, and print label information. Note: You must have the OCLC Label Program installed to produce labels.

Note: Moving the cursor over the action buttons also displays help. Netscape Navigator does not display some action button help.

Details on record fields (data entry boxes)

When you need more information on a field or detailed guidance on data entry, click the hyperlinked name of the desired field. A new browser window opens to display the section from *OCLC Bibliographic Formats and Standards* that describes the selected field and explains its use.

2.6 CatExpress: Add multiple location (852) fields

Multiple 852 location fields

If your local system accepts local item information in 852 fields (Location), you can use multiple 852 fields to record item information for multiple copies or volumes associated with a single record. Your local system may require a separate 852 field for each holding library code you add. Follow local guidelines.

Blank fields

Some or all of the Location data entry boxes may be left blank; however, you **must** enter a Location (\$a) code if you enter data in another data entry box in 852 (Location).

Add multiple 852 location fields

Use the following procedure to add multiple 852 fields to a record.

	Action	Result or Note
1	To add the first 852 field, click in the Location box.	The cursor blinks in the box.
2	Type a location and other 852 field information. Note: The 852 field is locally controlled. Follow local guidelines.	The location you type appears in the Location box.
3	To add an 852 field for a second copy, click Add More Locations above the Location box.	A new window opens. Note: If you see "Location information" instead of "Add More Locations," exit and log on again. If the problem persists, make sure your browser has JavaScript enabled
4	In the new window, type a location for the second 852. Click OK .	The screen reformats. The Location box changes to Current Location . Note: The Current Location field has a list box, which contains the locations you have entered.
5	Enter other information following local practice.	
6	Optional: Click Preview to check your work.	The Preview screen appears.
7	If you are finished entering data, click Save to Catalog .	The system responds, "Cataloging Successful."

Delete 852 location fields

You can use the following procedure at any time **before** you click **Save to Catalog**. If you have recataloged a record, another copy of it appears in your file of downloaded records.

2.6 CatExpress: Add multiple location (852) fields (continued)

	Action	Result or Note
1	On the Catalog screen, select the location you want to delete from the Current Location list box, then click Delete .	A new window opens. Note: When you delete a location, all 852 location data is also deleted.
2	Click Yes in the new window.	The Catalog screen reformats. Note: Current Location remains as long as you have at least 2 locations. If you delete all but one location, Current Location changes back to Add More Locations .

2.7 CatExpress: Print labels

About printing labels in CatExpress

- The OCLC Cataloging Label Program is required to create labels from CatExpress.
 - To view, edit, and print labels for a bibliographic record, you need the latest version of the Label Program (version 1.22 or later) installed on your workstation.
 - The Label Program is a Microsoft Windows-based application that is available at no charge from the OCLC web site. You must have Microsoft Windows to use the Label Program.

Download and install Label Program

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

2.7 CatExpress: Print labels (continued)

Set label format in CatExpress

Action
<p>In CatExpress, specify the label format you want to use for viewing and printing labels.</p> <ul style="list-style-type: none"> • On the General tab, under Admin Options, click Preferences. • At the Preferences screen, click Express Options. • On the Express Options screen, under Default Label Format, <p>Click to select one of the option buttons:</p> <ul style="list-style-type: none"> • SL4 (1 spine and 2 single-spaced card pocket labels) • SL6 (1 spine and 2 double-spaced card pocket labels) • SLB (1 spine and 1 card pocket label) • SP1 (spine label) <p>Default setting: SL4.</p> <p>Save changes to Express Options.</p> <ul style="list-style-type: none"> • Click Save as default or Use for this session only.

Create label

	Action
1	Retrieve the bibliographic record for which you want to print labels.
2	<p>Edit the record as you wish. For example:</p> <ul style="list-style-type: none"> • Supply a call number for the classification scheme your library uses. • Type a lowercase x as the only text in a call number field to produce labels without a call number. • Type input stamp(s) in brackets in the OCLC Holding Library Code field (049 field, subfield \$a). <ul style="list-style-type: none"> — If you type the input stamp to the left of the holding library code, the input stamp will appear above the call number on the spine and to the left of the call number on the pocket. — If you type the input stamp to the right of the holding library code, the input stamp will appear below the call number on the spine and to the right of the call number on the pocket. <p>— Examples [REF] azum azum [Prof][Shelf]</p> <p>Note on call numbers</p> <ul style="list-style-type: none"> • If you type a call number in the record, it will appear in the label. • If you do not type a call number, the system will automatically put into the label a call number (of the type you set as your default call number) from the record in the following order: <ul style="list-style-type: none"> — Library of Congress: 099, 098, 090, 050, 092 — Dewey: 099, 098, 092, 090, 050 — National Library of Medicine: 099, 098, 096, 060, 090, 050 • The system does not pull call numbers from 852, 082, or 086 fields.

2.7 CatExpress: Print labels (continued)

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

2.7 CatExpress: Print labels (continued)

Label formats

Label format	Label set produced
SL4	<p>1 spine label: Up to 9 lines of 8 characters each for call number and input stamps</p> <p>2 card/pocket labels: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title: 2 lines No blank lines</p>
SL6	<p>1 spine label: Up to 15 lines of 8 characters each for call number and input stamps</p> <p>2 card/pocket labels: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title: 2 lines Blank lines separate text groups</p> <p>Note: 9-line spine label in SL6 format. CatExpress sends 9 lines of SL6 spine label information to the Label Program. Most call numbers fit within 9 lines, so you seldom need to make adjustments. The SL6 display in the Label Program allows you to add additional lines on the spine label up to a total of 15, if needed.</p>
SLB	<p>1 spine label: Up to 9 lines of 8 characters each for call number and input stamps</p> <p>1 card/pocket label: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title: 2 lines No blank lines</p>
SP1	<p>1 spine label: Up to 9 lines of 8 characters each for call number and input stamps</p> <p>No card/pocket labels:</p>

Label Program documentation

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

2.8 CatExpress: Exporting records

How export works The export action produces a file of OCLC-MARC bibliographic records that are exported either by any user from one institution (OCLC symbol) or by one user (authorization number). The default file type is Institution. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to Individual. Records are added to the file as a result of your actions during a session.

Who can use export? Subscribers can use either export or Electronic MARC Subscription to receive records, but not both.

Interface users can use export regardless of their MARC Subscription status.

To change your record delivery method, contact your OCLC regional service provider.

Data in records Records include all information present in the MARC record, including:

- Updated 005 (Date and Time of Latest Transaction)
- 994 (the OCLC-MARC Processing Information) with encoded type of transaction
- Any user-entered information present in the edited record at the time of export, including default editing options

Subscribers vs. interface users Export functions differ depending on whether your institution is a CatExpress subscriber or is using CatExpress as an interface option.

User type	Command
Subscriber	<p>Use Save to Catalog to add records to export file.</p> <p>Note: Subscribers can use either export or Electronic MARC Subscription to receive records, but not both. To change your record delivery method, contact your OCLC regional service provider.</p> <p>The export file is built automatically when you click Save to Catalog. Records cannot be exported without holdings being set.</p>
Interface user	<p>Use Export only to add records to export file.</p> <p>Export only exports records without setting holdings.</p>
	<p>Save to Catalog:</p> <ul style="list-style-type: none"> • executes the Update command • creates file of records as part of Electronic MARC Subscription or export file (depending on profile)

2.8 CatExpress: Exporting records (continued)

Specify fields to delete from exported bibliographic records

- You can have the system remove specific fields from each bibliographic record before exporting the record for local use.
- You use tag numbers to specify single fields and/or field ranges

Export record (Save to catalog)

Each time you click **Save to Catalog** the current record is added to your export file.

Action	Result
Click Save to Catalog .	<p>If profiled for export: The Cataloging Successful screen displays the message, Item successfully cataloged. You now have [n] record(s) in your export file. Please select Download Export Files to retrieve exported records</p>
	<p>If profiled for Electronic MARC Subscription: The Cataloging Successful screen displays the message, Item successfully cataloged. Record available for download within 24 hours.</p>

Download export files

Export files:

- Are created and stored on the Connexion server.
- **Allow appending until downloaded.** You can continue exporting to the same file until you download the file.
- Contain records that are exported either by any user from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file type is **Institution**. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to **Individual**.
- Remain available for download for 30 days from the file creation date. After 30 days, the system automatically deletes export files.

Follow these steps when ready to download one or more export files.

	Action
1	Go to the Download Export Files screen. On the Express tab, on the Other Options list, click Download Export Files .
2	<ol style="list-style-type: none"> 1. In the list of files, find the file(s) you want to download. 2. Click to select the check box for the file. <p>Download multiple files: You can download 2 or more files at once. Before sending the files to the browser, the system creates one file that contains records from all selected export files.</p>
3	When finished selecting files, click Download .

2.8 CatExpress: Exporting records (continued)

	Action
4	<p>The next step depends on which browser you use.</p> <ul style="list-style-type: none"> • Internet Explorer. In the File Download dialog box, select Save or press <Enter>. • Netscape Navigator. In the Unknown File Type dialog box, click Save File.
5	<ol style="list-style-type: none"> 1. In the Save As dialog box, use the Save In box to select the location (drive and folder) where you want to save the exported record. 2. In the File Name box, use the supplied name. <p>Or</p> <p>Change the supplied file name and add the appropriate extension:</p> <ul style="list-style-type: none"> — Supply a name that identifies the file as containing records exported from Connexion. You may want to include a date or day of the week and/or the type of records contained in the export file. — Add an extension to the filename. <p>Note: An extension, such as .dat or .exp or .mrc, identifies the file format and/or content. A specific extension may be required if you plan to import record(s) from the file to a local system or other software.</p> <ul style="list-style-type: none"> — Note: To change the default file name for export files, use the Export File Name setting on the Export Options screen.
6	<ul style="list-style-type: none"> • Click Save or press <Enter>. • Click Close or press <Enter> to close the Download Complete message box.

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

Note: To change the default file name for export files, use the **Export File Name** setting on the CatExpress Export Options screen.

	Action
1	<p>When the Save As dialog box appears, the browser supplies a default location (drive and folder), file type, and file name. The File Name box is selected. To override the default file type and file name:</p> <ul style="list-style-type: none"> • In the File Name box, type the name for the export file, including the extension, enclosed in quotation marks. Use the extension your software requires to identify the file as a MARC export file (for example, .dat, .exp, or .mrc). • Example "exp1017.dat" <p>To save the export file to a different location, specify the drive and folder within the quotation marks:</p> <ul style="list-style-type: none"> • Type the drive letter followed by a colon and a backslash. • Type the folder name(s), separated by backslashes. • Example "c:\data\export0310\exp1017.dat"
2	<p>Click Save or press <Enter>.</p>

2.9 CatExpress: Fix errors

Fix errors

Clicking **Fix Errors** does not automatically correct errors; you must manually correct them. Follow the steps below.

	Action	Result
1	After entering data, click Save to Catalog .	Cataloging error screen appears.
2	Click Fix Errors .	The Cataloging screen returns with red error box. Note: If there are multiple errors, click the up and down arrow buttons on the right side of the red error box to view all error messages.
3	Type correct data in field named in red error box and click Save to Catalog .	The system responds, "Cataloging Successful."

Error conditions

Few error messages appear to CatExpress users. The most common are discussed below.

Kind of error	Error Condition	Explanation
Upper case index labels	Unable to find input query	Check to make sure that you are using lower-case letters for the search key index labels, e.g., [<i>au: twain</i>]. The system will not accept uppercase letters for the indexes.
Holding library code incorrectly typed	Invalid symbol ZZZZ in 1st \$a of 049 1st \$a in 049 is too short	Add or edit characters to the default institution symbol to create a holding library code.
Holding library code absent	Missing Main Holding Library 1st \$a in 049 is too short	Edit characters in the default institution symbol to create a valid holding library code.

Data Fields

In this chapter

This chapter contains the following topics:

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3.1 CatExpress: OCLC holding library code (049) field	3:2
3.2 CatExpress: Price (020) field	3:4
3.3 CatExpress: Call number: class, cutter, type (09x) field	3:5
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3.6 CatExpress: Summary (520) field	3:9
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3.9 CatExpress: Data fields mapped to local system fields	3:13

3.1 CatExpress: OCLC holding library code (049) field

Subfields in OCLC-MARC records OCLC Holding Library Code maps to field 049 (Local Holdings) subfield \$a (Holding library code) in OCLC-MARC records. **Important: This is a required field.**

Holding library code A holding library code identifies one location within a group and/or one collection at a location. These symbols and codes are assigned when your CatExpress profile is set up. The following examples illustrate holding library codes:

Example. Your library has OCLC symbol **ABC**. A typical holding library code might be **ABCG** to identify your general collection.

Example. Your library has OCLC symbol **QJTLZ**. A typical holding library code might be **MAIN** to identify your general collection.

If you have a special collection or type of material you want to identify within your library (apart from your general collection), use another holding library code:

Example. You need to put an item in your reference collection. A typical holding library code library might be **ABCR** or **REFR**.

Changing the holding library code If you set the default holding library code on the Express Options screen, CatExpress automatically inserts your library's default holding library code in the data entry box labeled OCLC Holding Library Code on the Catalog screen.

If you have not set your default holding library code, CatExpress uses the default holding library code based on your OCLC profile. On the Catalog screen, you can change the displayed holding library code by typing over over it You can type the code in uppercase or lowercase. Once set, the code persists until you change it or end your session.

If you need to know what your holding library codes are, check with your local system administrator or regional service provider for the appropriate character(s).

Profiles for OCLC symbols and holding library codes The profile set up by the local system administrator and regional service provider staff determines how OCLC institution symbols and holding library codes are used by your consortia, library, and/or local system.

Multiple holding library codes If you are adding multiple copies for multiple sites, you may enter multiple holding library codes. When entering multiple holding library codes in the 049 field (Holding Library Code) data entry box, type a comma and a space (,) before each additional code. For example, enter three codes as follows: **ABCG, ABCM, ABCR**. Your local system may require a separate location (852) field for each holding library code you add. Follow local guidelines.

Input stamps An input stamp is information you type in the 049 field, in square brackets([]), immediately before or after the holding library code. Usually, an input stamp identifies the location or collection represented by the holding library

3.1 CatExpress: OCLC holding library code (049) field [\(continued\)](#)

code. The input stamp appears on labels produced from the bibliographic record.

Follow local guidelines

For specific information on what you should enter, follow local guidelines.

3.2 CatExpress: Price (020) field

Subfields in OCLC-MARC records Price maps to field 020 (International Standard Book Number) subfield \$c (Terms of Availability) in OCLC-MARC records. This is an optional field.

Price The list price of the item. Include the appropriate currency symbol.

Note: Do not add a Price (020) field to a record that describes a serial. The Price (020) field is not valid in serial records, so its presence causes the record to fail system validation.

Examples

- Price (020 \$c): \$5.95
- Price (020 \$c): \$12.00
- Price (020 \$c): \$7.95
- Price (020 \$c): \$1.95 (pbk.)

3.3 CatExpress: Call number: class, cutter, type (09x) field

Fields and subfields in OCLC-MARC records Call number maps to one of the following depending on your selection in Type (these are optional fields):

- Field 090 (locally assigned LC-type call number) subfield \$a (classification number).
- Field 092 (locally assigned Dewey call number) subfield \$a (classification number).
- Field 096 (locally assigned NLM-type call number) subfield \$a (classification number).
- Field 099 (local free-text call number) subfield \$a (classification number).
Note: The 099 field is for call numbers based on a unique local classification scheme or for call numbers from a standard scheme (LC, Dewey, Government Document numbers) that are irregularly formatted.

Cutter mapping to OCLC-MARC

Cutter number from field below	Maps to
090 (locally assigned LC-type call number)	Subfield \$b (local Cutter number)
092 (locally assigned Dewey call number)	Subfield \$b (item number)
096 (locally assigned NLM-type call number)	Subfield \$b (item number)
099 (local free-text call number)	Second subfield \$a

Call number and Cutter number

Call number	Cutter	Type
j888.0108	C832	Dewey
932.046	B61a	Dewey
813.54	Butterworth	Dewey
Fic	OHENRY	Local
Z711.9	.U58 1998	LC
PS3553.L245	R35 1998b	LC
WO 100 B865s 1973		NLM
Q 180.A8	D618	NLM

Type

Use the list to choose the type of call number (Dewey, LC, NLM, or Local).

Automatic class number addition to Dewey

If a record has a class number in field 082 and you enter a Cutter number without entering a class number, CatExpress automatically transfers the call number information from field 082 to the 092 in the OCLC-MARC record you receive. You do not see this transfer happen on the screen.

3.3 CatExpress: Call number: class, cutter, type (09x) field

852 and local systems Some local systems require call numbers in the 852 location field. Check with your system administrator to see if call numbers are required here in addition to being entered in the data entry boxes (090, 092, 096, 099) under the holding library code.

3.4 CatExpress: Location (852) field

Subfields in OCLC-MARC records

Location maps to field 852 (Location) in OCLC-MARC records. This field may be used to record local item information. Not all local library systems can use 852 information. Confirm whether your system accepts 852 before using this field. This is an optional field.

Location information

Location information is mapped to the specific subfields in OCLC-MARC records. The following table is an example of how data fields might map to a local system:

CatExpress	Local system	Example 1	Example 2
Location (\$a):	Institution/location	OSUM	ABCR
Sublocation (\$b):	General location code	third floor	art collection
Shelving Location (\$c):	Collection code	EPROF	EFIC
Class (\$h):	Classification part of the call number	027.8223	813
Cutter (\$i):	Item part of the call number	M82HI	C976wh
Shelving Control# (\$j):	Shelving control number	v.1	c. 3
Barcode (\$p):	Accession number	033450071234	6870291458
Public Note (\$z):	Note (Public)	vol. 3 missing	7-day loan

Blank fields

You may leave some or all of the Location data entry boxes blank. However, **if** you enter data in any other data entry box in 852 (Location), then you **must** enter a Location (\$a) code.

Local guidelines

For specific information about what you should enter, follow local guidelines.

3.5 CatExpress: Target audience, scale, source (521) field

Subfields in OCLC-MARC records

Target Audience maps to field 521 (Target Audience Note) subfield \$a (Target audience note) in OCLC-MARC records. Scale maps to first indicator value (Level of Interest) in field 521 in OCLC-MARC records. Source maps to field 521 subfield \$b (Source) in OCLC-MARC records. Your choice of Scale will control the indicator value in the 521 field. This is an optional field.

Target audience

A note describing the target audience of the item.

Scale

Scale choices	Use when
Blank [No information provided]	The data in Target Audience does not pertain to a listed Scale or no information is available.
Reading Level (by grade)	The data in Target Audience describes the grade level at which the item is meant to be read.
Interest Level (by age)	The data in Target Audience pertains to the age level at which the item is most likely of interest.
Interest Level (by grade)	The data in Target Audience describes the grade level at which the item is most likely of interest.
Special Audience	The data in Target Audience is for a specialized audience to which the item is most likely of interest.
Motivation Interest Level	The data in Target Audience describes the motivation and/or interest level of the audience for which the item is best suited.

Source

The name or abbreviation of the agency or entity assigning the information.

Examples

Target audience	Scale	Source
For 9-12 years old	Blank	Blank
Adults 18 and older	Blank	Blank
Clinical students	Blank	Blank
3.1	Reading Grade Level	Blank
008-012	Interest Age Level	Blank
7 & up	Interest Grade Level	Blank
K-3	Interest Grade Level	Follett Library Book Co.
Vision impaired	Special Audience	LNOCA
High interest	Motivation Interest Level	LNOCA

Character limit

Up to 1,879 characters or spaces in Target Audience and Source combined.

3.6 CatExpress: Summary (520) field

Subfields in OCLC-MARC records Summary maps to field 520 (Summary, Etc. Note) subfield \$a (Summary, etc. note). Type maps to the first indicator value (Type) of field 520, which determines the kind of Summary Note (Summary, Etc. Note). Your choice of Type will control the indicator value in the 520 field. This is an optional field.

Summary information A summary, abstract, annotation, review, or other note. If you choose a value from the list box, you do not need to type the words Summary, Review, Scope and Content, or Abstract before your note.

Type Type describes the type of note in field 520.

Type choice	Use when
Blank	There is no information about the nature of the Summary.
Subject	The note is a brief, general description of the subject(s) covered by an item.
Review	The note is a review or from a review of the item.
Scope/Content	The note is an itemized listing of the contents of an item.
Abstract	The note is a summary of the main points of an item.

Examples

Type choice	Examples of summary
Blank	Defines and illustrates various modernist styles in American painting.
Blank	Jed and his dad find that fishing is a great way to pass a rainy day.
Blank	Shows the routes of Amundsen, Byrd, and Gould.
Blank	An illustrated collection of nursery rhymes set to music.
Subject	An historical and archaeological tour of ancient art in the Holy Land.
Review	Provocative but well-argued reinterpretation of the region's artistic history with illustrations effectively used.
Scope/Content	Series consists of minutes of meetings of the Board together with correspondence and other documents referred to in the minutes.
Scope/Content	Phoenician art, Hebrew art, Egyptian influence & Syrian influence, Hellenistic period, Roman period.
Abstract	The study examines the fertility history of American couples in metropolitan America and the motivational connections between the environment and fertility decisions and behavior.
Abstract	Argues for a common stylistic vocabulary that was continuously used by artists in the region. Shows similarities across national and religious lines.

3.6 CatExpress: Summary (520) field [\(continued\)](#)

Character limit Up to 1,879 characters or spaces.

3.7 CatExpress: General note (500) field

Subfields in OCLC-MARC records General Note maps to field 500 (General Note) subfield \$a (General Note). This is an optional field.

General information Enter notes for bibliographic data **not** present elsewhere in the record or information that is present elsewhere but must be repeated in field 500 to provide an intelligible note.

Examples

- This is part of the Johnson ecology series.
- An adaptation of the 1922 film of the same title.
- Slides with every 7th issue.
- Subtitle varies.
- Microfilm; original signed by John Hancock.

Character limit Up to 1,879 characters or spaces.

3.8 CatExpress: Nonpublic note (590) field

Subfields in OCLC-MARC records Nonpublic Note maps to field 590 (Nonpublic Note) subfield \$a (Nonpublic Note). This is an optional field.

Nonpublic information Enter notes for information specific to the item in hand and needed by library staff, but which patrons do not need to know. This note does not display to the public.

Examples

- Gift of Ms. Edith Sinclair.
- Ordered from [vendor name].
- Donated by the Friends of the Library.
- Fund ID: En930704.

Character limit Up to 1,879 characters or spaces.

3.9 CatExpress: Data fields mapped to local system fields

Data fields mapped to local system fields

This table provides space for you to match your local system fields to data fields. Your local system administrator completes the local system column.

OCLC-MARC	Label	Local system*
020 \$c	Price	
049 \$a	OCLC holding library code	
090 LC number \$a \$b	Call number/Class Cutter	
092 Dewey number \$a \$b	Call number/Class Cutter	
096 NLM number \$a \$b	Call number/Class Cutter	
099 Local number \$a \$a	Call number/Class Cutter	
500 \$a	General note	
520 \$a First indicator: Blank (no information) 0 1	Summary Blank Subject Review	
521 First indicator: Blank (no information) 0 1 2 3 4 \$a \$b	Target audience Blank Reading level (by grade) Interest level (by age) Interest level (by grade) Special audience Motivation interest level Target audience Source	
526 \$a \$b \$c \$d \$i \$x \$z Reading Program Display Constant	Study program note Program note Interest level Reading level Title point value Display text Nonpublic note Public note Reading program / No display constant	
590 \$a	Nonpublic note	

3.9 CatExpress: Data fields mapped to local system fields

OCLC-MARC	Label	Local system*
852	Location	
\$a	Location	
\$b	Sublocation	
\$c	Shelving location	
\$h	Class	
\$i	Cutter	
\$k	Call number prefix	
\$j	Shelving control number	
\$p	Barcode	
\$t	Copy number	
\$z	Public note	

*Information supplied by local system administrator.

MARC Records and Transaction Reports

In this chapter

This chapter contains the following topics:

Subject	Page
4.1 CatExpress: MARC records and transaction reports	4:2

4.1 CatExpress: MARC records and transaction reports

MARC Subscription files

Characteristic	Description
Availability	Each file is constructed from the previous day's activity, which ends at midnight, Eastern Time, USA. You can retrieve files any time of day except Sunday 2:00 am to 6:00 am (Eastern Time, USA).
Longevity	MARC Subscription record files remain posted for 90 days.
Archive records	MARC Subscription files removed after 90 days are archived for one year and must be retrieved by request through your network or regional service center.
Other retrieval methods	OCLC offers other methods of record retrieval for these situations: <ul style="list-style-type: none"> • If your library is participating in a consortium or other shared union catalog • If your library needs an FTP method of file transfer Contact your OCLC regional service provider for more information.
Other records in file	In addition to records you create, MARC Subscription records include all other records created on behalf of your institution, regardless of their source. For example, EMS records could include records from: <ul style="list-style-type: none"> • Union listing or cataloging agents • Language Set orders • Contract Cataloging activity • WorldCat Cataloging Partners activity • Delete holdings transactions

Monthly transaction reports

Who receives reports? Monthly transaction reports for individual libraries and for libraries subscribing as a group are mounted each month on the Product Services Web.

Reports for subscribers only. Reports are **not** available for libraries that use the CatExpress interface but do not subscribe to the service.

Characteristic	Description
Availability	Each month OCLC mounts your reports on Product Services Web.
Longevity	Reports remain available for 90 days.

4.1 CatExpress: MARC records and transaction reports (continued)

Characteristic	Description
Content	<p>The reports list transactions for the current month's activity and year-to-date activity (year-to-date activity is for the subscription year, not the calendar year).</p> <p>Reports include 4 kinds of information:</p> <ul style="list-style-type: none">• Setholds: The number of times your institution symbol was added to a record as a first-time use. Any usage after your first time use is not counted against your CatExpress subscription level.• Deletes: The number of times you delete your institution symbol from a record.• Searches: The number of searches you performed in CatExpress.• Records Delivered: The number of records in your OCLC-MARC Subscription, including all records cataloged for the first time and subsequent times and all records that have been deleted. <p>Note: If you have your records delivered to or picked up by a third party, this count may be zero.</p>
Format	<p>The reports are available in both a text format and in a comma-delimited format, which can be loaded into a spreadsheet.</p>

Download MARC Subscription records or transaction reports

Two ways to access MARC records and transaction reports. Files are posted on OCLC Product Services Web. You can access the files on PSW in two ways. The following table gives instructions for using either method.

- **From within a CatExpress session.** On the Express tab, under Other Options, click **Download Records**. You go directly to the Records and Reports screen and you do not need to log on to PSW.
- **Direct to PSW.** If not logged on to CatExpress, go directly to PSW. From the Welcome screen, navigate to the Records and Reports screen. When you select a file type, PSW asks you to enter an authorization and password. Use your CatExpress authorization or any valid OCLC authorization.

Rename files of MARC records. Some local systems may have specific requirements for file names. Step 6 explains how to rename files of MARC records if the system-supplied name is incompatible with your local system. Once you have renamed your file, you can load it into your local system.

4.1 CatExpress: MARC records and transaction reports (continued)

	Action	Result
1	<p>Go to OCLC Product Services Web.</p> <ul style="list-style-type: none"> • From CatExpress session On the Express tab, under Other Options, click Download Records. <p>Or</p> <ul style="list-style-type: none"> • Direct to PSW Point your browser to the Product Services Web site at http://psw.oclc.org 	<p>From CatExpress session: The Records and Reports screen appears. Go to step 3. The screen contains the following lists:</p> <ul style="list-style-type: none"> • Records and their Associated Reports • Reports and Statistics • Sample Records and Reports <p>Or Direct to PSW: The Product Services Web Welcome screen appears. Go to step 2.</p>
2	<p>Direct to PSW: On the left side of the Product Services Web Welcome screen, click Records and Reports.</p>	<p>The Records and Reports screen appears. Go to step 3. The screen contains the following lists:</p> <ul style="list-style-type: none"> • Records and their Associated Reports • Reports and Statistics • Sample Records and Reports
3	<p>Retrieve MARC records Under Records and their Associated Reports, click OCLC MARC Subscription records and reports.</p> <p>Or Retrieve transaction reports Under Reports and Statistics, click OCLC CatExpress Transaction Reports.</p>	<p>From CatExpress session: If you access PSW from within CatExpress, a screen appears listing files for your institution, either MARC Subscription records or CatExpress transaction reports. Go to step 5.</p> <p>Or Direct to PSW: If you go directly to PSW, the Product Services authorization screen appears. Go to step 4.</p>
4	<p>Direct to PSW: Log on to PSW If asked to log on, type your CatExpress authorization and password, and then click Enter.</p>	<p>A screen appears listing files for your institution, either MARC Subscription records or CatExpress transaction reports.</p>

4.1 CatExpress: MARC records and transaction reports (continued)

	Action	Result
5	<p>Download the file you want Click the Download link.</p> <p>Or View the file (transaction reports only). Click the View link. To close the viewing window and return to the list of files, click the Back button in your browser.</p> <p>Note: You cannot view files of MARC records.</p>	<p>Download file Internet Explorer: The Save As dialog box appears. Netscape Navigator: The Save dialog box appears. (Note: If Netscape displays a dialog box asking for instructions, select Save it to disk and then click OK.) To continue and download the file, go to step 6.</p>
6	<p>Optional. Rename file. On the bottom of the Save dialog box in the File name box, type the name of the file using local file naming conventions.</p>	<p>The name you type appears in the File name box. Hard drive or diskette: You can save the file to a hard drive or diskette drive by changing the file location in the Save in box.</p>
7	<p>Optional. Select file type and extension from list. Below the File name box, in the Save as type area, click the arrow to open the list, and choose a file type and extension. Follow local guidelines to determine the extension to use.</p>	<p>The file type you select appears in the Save as type box.</p>
8	<p>Complete downloading a file Internet Explorer: In the Save As dialog box, click Save. Netscape Navigator: In the Save dialog box, click Save.</p>	<p>The browser saves the file on your workstation in the specified location.</p>