

Authorities: Use Authority Constant Data

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Revision History

Date	Section title	Description of changes
June 2006	1 Create authority constant data	<ul style="list-style-type: none">• Added caution not to use punctuation, special characters, or diacritics in names or My Statuses for online constant data records• Added list of editing techniques to use for constant data records (procedures given in “Edit Authority Records”• Added note about copying or moving constant data records selected in a local file list: Copy or move to another local file or to the online file, but cannot copy or move multiple selected online constant data records to local file.
	2. Apply authority constant data	Added caution to procedure for applying constant data from a list: If you select multiple records in a list and then click Apply Selected in the list window, only the last record of the selected records is applied.

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1 Create, edit, or delete authority constant data records

Create constant data online or in local files

Using the Connexion client, you can create authority constant data online or create constant data in one or more local files located on your workstation or moved to a shared network drive. The client provides a blank default local constant data file (**DefaultAuthCD.authcd.db**). See more about local files, their locations, and how to share them in Basics, Manage Local Files, “Manage local files.”

This topic covers procedures for creating constant data both online and in local constant data files.

About authority constant data records

Why create constant data records?

Using constant data is a way to apply frequently used information to records. You add the same data to authority records to:

- Avoid rekeying frequently used data
- Reduce errors and improve consistency among related records
- Develop and maintain local standards for authority records, for specific collections, or for different types of resources

What is authority constant data?

A constant data record is a partial bibliographic or authority record you create that contains standardized content for reuse when you create or edit a record.

Online constant data:

- Users at the same institution (same OCLC symbol) share an online constant data file to store all constant data records you create online.
- There is only one online constant data file. It is accessed by both Connexion interfaces, the browser and the client.
- Anyone at your institution can add constant data records to this file, edit them, use a stored record as default constant data, or delete records.
- Your library's constant data records are not shared with Connexion users at any other institution.
- When you set a constant data record as the default, it is associated with your logon authorization. Staff sharing the authorization also share the default constant data.

Local constant data:

- The local authority constant data file is located on your workstation or can be located on a network drive for shared access.
- You can use the local files to create, store, and apply authority constant data offline or to apply to online records when logged on.

- The Connexion client automatically creates a default local authority constant data file when you install the software. The path and file name is:
X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Db\DefaultAuthCD.authcd.db (where **X** is the letter of your hard drive)
- Create multiple local authority constant data files on your workstation or on a shared drive for special tasks or for use by individual staff members. Designate or change the default. Move or copy records from one local file to another.
- You cannot delete your designated default local constant data record.
- When you set a local constant data record as the default, it is stored in the local file. You can store one default local constant data record per local file. To use a particular default local constant data record, the file that contains it must be set as the default local file.

For more about working with local constant data files, see Basics, Manage Local Files, “Manage local files.”

Maximum number of records in an online or local save file: 9,999. The system prevents you from adding records that would exceed the limit.

About creating constant data:

- Create a constant data record from a workform based on a specific format (Personal Name, Series, etc.) or you can "derive" a constant data record from an existing authority record or from another constant data record.
- When you create a constant data record, you must enter a name.
- Optionally, you can also enter a custom My Status.
- The name and My Status help you retrieve records.

About applying constant data to authority records:

- Designate a record as the default when you create it or later. Then, when you want to insert the constant data into a record:

When logged on, on the Edit menu, click **Constant Data > Online > Apply Default** (or press <Ctrl><A>).

Or

When logged on or offline, click **Constant Data > Local > Apply Default** (or press <Ctrl><V>).

Note: Your default online constant data is tied to your logon authorization (anyone logging on using the authorization has the same default). Your default local constant data is tied to the local file. To maintain different default constant data, staff members can use separate local constant data files.

- Alternatively, apply constant data by name or from a list. Use the same menus and submenus as listed in the previous bullet, but click one of the following (for

Online options, you must be logged on):

Edit > Constant Data > Online > Apply by Name (or press <Ctrl><U>)

Edit > Constant Data > Local > Apply by Name (or press <Ctrl>)

Edit > Constant Data > Online > Apply from List (or press <Alt><E><O><L>)

Edit > Constant Data > Local > Apply from List (or press <Alt><E><L><L>)

About bibliographic constant data records. Why create constant data records?

Using constant data is a way to apply frequently used information to records. You add the same data to bibliographic records to:

- Avoid rekeying frequently used data
- Reduce errors and improve consistency among related records
- Develop and maintain local standards for bibliographic records, for specific collections, or for different types of resources

What is bibliographic constant data?

A constant data record is a partial bibliographic or authority record you create that contains standardized content for reuse when you create or edit a record.

Online constant data:

- Users at the same institution (same OCLC symbol) share an online constant data file to store all constant data records you create online.
- There is only one online constant data file. It is accessed by both Connexion interfaces, the browser and the client.
- Anyone at your institution can add constant data records to this database, edit them, use a stored record as default constant data, or delete records.
- Your library's constant data records are not shared with Connexion users at any other institution.
- When you set a constant data record as the default, it is associated with your logon authorization. Staff sharing the authorization also share the default constant data.

Local constant data:

- The local bibliographic constant data file is located on your workstation or can be located on a network drive for shared access.
- Use the local files to create, store, and apply bibliographic constant data offline or to apply to online records when logged on.
- The Connexion client automatically creates a default local bibliographic constant data file when you install the software. The path and file name is:
X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Db\DefaultBibCD.bibcd.db (where **X** is the letter of your hard drive)

- Create multiple local bibliographic constant data files on your workstation or on a shared drive for special tasks or for use by individual staff members. Designate or change the default. And move or copy records from one local file to another.
- You cannot delete your designated default local constant data record.
- When you set a local constant data record as the default, it is stored in the local file. By assigning different authorizations to local files, staff can maintain different default constant data.

For more about working with local constant data files, see Basics, Manage Local Files, "Manage local files."

Maximum number of records in an online or local save file: 9,999. The system prevents you from adding records that would exceed the limit.

About creating constant data:

- Create a constant data record from a workform based on a specific MARC format (Books, Scores, etc.), or "derive" a constant data record from an existing bibliographic record or from another constant data record.
- When you create a constant data record, you must enter a name.
- Optionally, you can also enter a custom My Status.
- The name and My Status help you retrieve records.

About applying constant data to bibliographic records:

- Designate a record as the default when you create it or later. Then, when you want to insert the constant data into a record:

When logged on, on the Edit menu, click **Constant Data > Online > Apply Default** (or press <Ctrl><A>).

Or

When logged on or offline, click **Constant Data > Local > Apply Default** (or press <Ctrl><V>).

Note: Your **default online** constant data is tied to your logon authorization (anyone logging on using the authorization has the same default). Your **default local** constant data is tied to the local file. To maintain different default constant data, staff members can use separate local constant data files.

- Alternatively, apply constant data by name or from a list. Use the same menus and submenus as listed in the previous bullet, but click one of the following (for Online commands, you must be logged on):

Edit > Constant Data > Online > Apply by Name (or press <Ctrl><U>)

Edit > Constant Data > Local > Apply by Name (or press <Ctrl>)

Edit > Constant Data > Online > Apply from List (or press <Alt><E><O><L>)

Edit > Constant Data > Local > Apply from List (or press <Alt><E><L><L>)

Caution for online constant data only: When you create a constant data record, you are required to give it a unique name. When you name **online** constant data

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records or assign an optional My Status, avoid using punctuation, special characters, and diacritics. These characters can cause errors when you retrieve, save, apply, delete, or take other actions on the records.

Do not use the following characters in online constant data names or optional My Statuses:

Period (full stop)	.	Ampersand	&
Comma	,	Pound sign	#
Semi-colon	;	Double quotation marks	" "
Colon	:	Apostrophe	'
Underscore	_	Percent mark	%
Asterisk	*	Question mark	?
Plus sign	+		

To be sure that online constant data records are problem-free, use only standard letters (upper- and lowercase) and numbers in names and My Statuses.

This restriction for constant data names and My Statuses does not apply to local constant data records.

Create a constant data record from a workform

	Action
1	Logged on or offline, on the Authorities menu, click Create > Constant Data , or press <Ctrl><Shift><N>.
2	In the Create a New Constant Data dialog in the Workform Type list, click a format for the new constant data record: <ul style="list-style-type: none">• Blank Record(default)• Conference Name• Corporate Name• Geographics• Personal Name• Series• Uniform Title
3	Click OK or press <Enter>, or click Cancel . Result: The new constant data record opens.

	Action
4	<p>Enter content you want to reuse in authority records.</p> <p>Specifics:</p> <ul style="list-style-type: none"> • To insert empty fields or elements via constant data: <p>In the constant data record, include the appropriate tag or label and enter a few characters in the content area. (Constant data does not retain empty fields/elements.)</p> • To retain empty subfields in variable fields: <p>If variable fields in a constant data record include subfields that contain valid values, the subfields remain in the field added to the authority record.</p> <p>To keep empty subfield codes in a variable field, after each subfield code type [BLANK] (a vertical bar character, the uppercase letters BLANK, and then another vertical bar).</p> <p>When you apply the constant data, the subfield code (followed by a space) appears in the added variable field.</p> • Protect fixed-field elements in records: <p>If you select to apply the fixed field when you apply constant data, by default, the fixed field overwrites the fixed field in a record. You can prevent a specific element in the fixed field from being replaced:</p> <ul style="list-style-type: none"> — In the constant data record, type asterisks (*) in the text box for the element. Type one asterisk for each character of the element value. — For example, to preserve the value for the Lang element in authority records, type *** in the Lang element of the constant data record.
5	<p>On the Action menu, click Save Record to Online File, or press <Ctrl><Alt><V> (available only if you are logged on).</p> <p>Or</p> <p>Click Save Record to Local File, or press <F4>.</p>

	Action
6	<p>In the Enter Constant Data Information dialog:</p> <ul style="list-style-type: none"> • Required. Type a descriptive name for the new record. • Optional. Click the Make Default Constant Data check box to make the new record the default. <p>Result: If you check the box to make the record the default, the Fields to Apply dialog opens. Select which MARC fields you want to apply when you use the record:</p> <ul style="list-style-type: none"> — Fixed field — Variable fields — Both <ul style="list-style-type: none"> • Optional for local file records. In the My Status text box, type a word or phrase that will help you identify the record easily (maximum of 40 characters, free text). To change the My Status later, open the record, and on the Action menu, click Set Status or press <Alt><Shift><S>. <p>Note: You can assign a My Status to an online constant data record, but the system simply deletes it when you save the record online.</p> <p>Tip: If multiple staff people work with constant data records in the same file (online or local), you can assign your name as My Status for the records. To retrieve only your constant data records, limit searching by My Status [your name].</p>
7	<p>Click OK or press <Enter>, or click Cancel.</p> <p>Results:</p> <ul style="list-style-type: none"> • The system adds the new authority constant data record to your institution's constant data file. • The system redisplay the authority constant data record with empty fields removed. • If you save the record to the online file, the record closes. • If you save the record to the local file, the record remains open.

Derive a constant data record from an authority or constant data record

	Action
1	<p>With an online or local authority record or an existing constant data record open:</p> <p>On the Edit menu, click Derive > New Constant Data, or press <Ctrl><I>.</p> <p>See also: Cataloging: Create Authority Records, "Create an authority record from an existing record" for:</p> <ul style="list-style-type: none"> • Specifics about the data the client transfers • How to pre-select fields you want to transfer to derived records (Tools > Options > Derive Record tab) <p>These descriptions about deriving bibliographic records apply also to deriving authority constant data records.</p>
2	<p>When the client asks if you want to transfer the fixed field values to the new record:</p> <p>Click Yes to transfer the fixed field.</p> <p>Or</p> <p>Click No to derive the new record without transferring the fixed field.</p> <p>Or</p> <p>Click Cancel to cancel deriving a new record</p> <p>Result (unless you cancel derive): The client redisplay a new constant data record with data derived from the authority record.</p> <p>Result of transferring the fixed field:</p> <p>The fixed field values from the original record transfer, except for:</p> <ul style="list-style-type: none"> • OCLC number • Rec Stat • Entered Date • Replaced Date
3	<p>To complete the record, edit it and/or follow steps 4 - 7 in the procedure above for constant data workforms.</p>

Caution on saving constant data from the local file to the online file

If you save a constant data record from the local file to the online constant data file and the record name already exists in the online file, you receive an error message. You cannot change the name to make it unique. Instead, derive a new constant data record (**Edit > Derive > New Constant Data**, or <Ctrl><I>) and assign a new name.

Edit a constant data record

More than one person at your library can access the online or local constant data file, but only one person at a time can open a constant data record from either file. Other staff at your library cannot access the record until you save or cancel your changes and close the record.


Use the following techniques and procedures for editing authority constant data records as for editing authority records (see Authorities, Edit Authority Records):

- Text strings
- MARC field Help
- Text editing commands

- Right-click shortcut menu
- Move to next record area
- Change the position of the fixed field or display as variable fields
- Change the fixed field to another MARC format
- Find and replace text
- Edit or insert field 006
- Reformat records
- View institution name for symbol in 040
- Open and view multiple record and list windows: When to pin

Information on fields restricted for editing (see Edit Authority Records) and on saving records (see Save Authority Records) also applies to constant data records.

Delete a constant data record

	Action
1	<p>Open an authority constant data record you want to delete from either the online save file or the local save file, or select records in a local authority constant data list.</p> <p>Note: For local constant data only, you cannot delete your default record. The client gives you an error message if you try. To delete your default constant data record, first set another record as the default (see “Apply authority constant data” for the procedure for setting/changing the default record).</p> <p>Caution: If you share local constant data with other staff, another staff member can delete your local default record.</p>
2	<p>On the Action menu, click Delete Record, or click , or press <Ctrl><Alt><D>.</p>
3	<p>Click Yes to confirm or No to keep the record.</p>

Tips for using constant data

- **Copying constant data records within a file.**

You cannot copy constant data records within the same local file, since each record must have a unique name. To copy a record within the same file, derive a new record from the one you want to copy (**Edit > Derive > New Constant Data**) and give it a different name.

- **Copying or moving constant data to another file.**

—If you maintain more than one local bibliographic constant data file, you can copy or move single records from one local file to another.

—You can also copy or move multiple constant data records selected in a local file list to another local file or to the online constant data file.

—You cannot move records selected in an **online** constant data list to a local file.

- **Local file size.**

When you delete or move records from a local file, file size (number of bytes) does not change.

To remove empty space in a local file, you can compact and/or repair local files after deleting and moving records (**File > Local File Manager**; click **Compact/Repair**).

See Basics, Manage Local Files, “Manage local files” for more information on moving records and compacting/repairing local files.

2 Apply authority constant data

Ways to apply constant data

You can apply online or local constant data several ways using **Edit > Constant Data** commands on either the Online submenu or the Local submenu:

- **Apply default.** If you have set a default constant data record, selected the fields you want to apply (fixed, variable, or both), you can apply the default to records using a single command.

Or apply the default to:

- Imported records—applies local default constant data (see "Import authority records")
- Records retrieved via batch searching—applies online default constant data if you import to the online save file or applies the local default if you import to the local save file (see "Run batch processing")

- **Apply by name.** Enter the name of the constant data record you want to apply and select the fields to apply (fixed, variable, or both).
- **Apply from a list.** Retrieve a list of constant data records, select a record you want to apply, select the fields to apply (fixed, variable, or both), and apply from the list.

About default constant data

- Online default constant data:
 - One online default constant data record is associated with each Connexion authorization during each session.
 - If multiple people at your institution share the same authorization, you also share one default constant data.
 - If one person changes the default constant data, the new default is set for all people who share the authorization.

- Local default constant data:

You can create as many local constant data files as you need to accommodate the needs of different staff people. However, if you share a local file:

- Each can have only one designated default constant data record.
- If multiple people share the same local file, you also share one default constant data.
- If one person changes the default constant data, the new default is set for all people who share the local file

- You can set any constant data record as your default authority constant data.
- You can edit your default authority constant data or change the default to another record any time.
- The advantage of using default constant data is that you can apply data you use without having to remember a record's name or search for the constant data record first.

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Set default constant data record

You can designate a constant data record as the default when you create it (see “Create, edit, or delete constant data records”) or make an existing record the default. To make an existing record the default:

	Action
1	<p>With an online constant data record open, on the Edit menu, click Constant Data > Online > Set as Default, or press <Alt><E><D><O><D>.</p> <p>Or</p> <p>With a local constant data record open, on the Edit menu, click Constant Data > Local > Set as Default, or press <Alt><E><D><L><D>.</p>
2	<p>In the Fields to Apply dialog, select the MARC fields you want to apply: Fixed, Variable, or Both.</p> <p>Default: Variable fields</p> <p>See “MARC-fields-to-apply option” below.</p> <p>Note: To change the Fields to Apply setting for a default constant data record, you must reset the record as default to open the Fields to Apply dialog.</p>
3	Click OK or press <Enter>.

View default constant data

Action
<p>While logged on or offline:</p> <p>On the Authorities menu, click Show > Default Online Constant Data, or press <Ctrl><Shift><O>.</p> <p>Result if offline: The Logon OCLC Connexion dialog opens. As soon as you log on and close the Message of the Day, the default constant data record opens automatically.</p> <p>Or</p> <p>On the Authorities menu, click Show > Default Local Constant Data, or press <Alt><U><H><D>.</p>

Tip: To view the name(s) of the default(s):

- When you search for constant data records, the name of the default record displays at the top of the results list.
- On the View menu, click **User Information**, or press <Ctrl><Alt><U>. The User Information dialog shows the default online and local constant data records.

Apply default constant data

Action
<p>With an online or local authority record open:</p> <p>Apply online default: On the Edit menu, click Constant Data > Online >Apply Default, or press <Ctrl><A>.</p> <p>Or</p> <p>Apply local default: On the Edit menu, click Constant Data > Local >Apply Default, or press <Ctrl><Y>.</p> <p>See "MARC fields-to-apply option" below for more details.</p>

Note: Alternatively, apply the default constant data automatically to:

- Imported records (see "Import authority records")
- Records retrieved via batch searching (see "Run batch processing")

Apply constant data by name

	Action
1	<p>With an online or local authority record open:</p> <p>Apply online constant data by name: While logged on, on the Edit menu, click Constant Data > Online > Apply by Name, or press <Ctrl><U>.</p> <p>Or</p> <p>Apply local constant data by name: While logged on or offline, on the Edit menu, click Constant Data > Local > Apply by Name, or press <Ctrl>.</p>
2	<p>In the Apply Constant Data Record dialog, type the name of the constant data record you want to apply.</p>
3	<p>Click a button to select the MARC fields you want to apply: Fixed, Variable, or Both.</p> <p>Default: Variable</p> <p>See "MARC-fields-to-apply option" for details.</p>
4	<p>Click OK or press <Enter> to apply.</p> <p>Or</p> <p>Click Cancel to cancel applying constant data.</p>

Apply constant data from a list

Selecting and applying a constant data record from a list allows you to:

- Retrieve and apply any authority constant data record.
- Apply an authority constant data record without first making it your default constant data.

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- Specify different MARC fields to apply than those you selected for a default constant data.

Caution: If you have only one constant data record, you cannot apply from a list. Either:

- Set the single constant data record as the default, and then apply the default.
- Or
- Apply the single constant data record by name

If you have multiple constant data records, to retrieve a list of all of them (same procedure as searching for constant data records):

	Action
1	<p>With an authority record open to which you want to apply a selected constant data record:</p> <p>While logged on, on the Edit menu, click Constant Data > Online > Apply from List (or press <Alt><E><D><O><L>).</p> <p>Or</p> <p>While logged on or offline, on the Edit menu, click Constant Data > Local > Apply from List (or press <Alt><E><D><L><L>).</p> <p>Or</p> <p>While logged on, on the Authorities menu, click Search > Online Constant Data (or press <Ctrl><N>).</p> <p>Or</p> <p>While logged on or offline, on the Authorities menu, click Search > Local Constant Data (or press <Ctrl><L>).</p>
2	<p>In the Search Online [or Local] Authority Constant Data dialog:</p> <p>Search for a specific record by entering a name.</p> <p>Or</p> <p>Retrieve all constant data records: Leave text boxes empty, or click Clear Search.</p>
3	<p>Click OK, or press <Enter>.</p>
4	<p>In the Online [or Local] Authority Constant Data List, select the name of the record you want to apply.</p>
5	<p>At the top of the list under MARC Fields to Apply, select Fixed, Variable, or Both.</p> <p>Default: Variable</p> <p>See "MARC-fields-to-apply option" for details.</p>
6	<p>At the top of the list, click Apply Selected.</p> <p>Caution for local file only: If you selected multiple constant data and then applied from the list, only the last constant data record among the selected records is applied. (You cannot select multiple records in the online constant data file.)</p>

Tip: You can leave the list of constant data records open in order to apply constant data from the list many times.

Once you have an authority record or a list of selected records open to which you want to apply constant data, use **Window > [name of window]**, or press <Alt><W><[window number] to return to the constant data list. Then, when you apply constant data from the list, the client applies it to the correct window, the last open window.

Do not use <Ctrl><Tab> or <Ctrl><F6>, since as you toggle through windows to get to the constant data list, the last open window is not the correct target for the constant data.

MARC-fields-to-apply option

Depending on the option you select in **MARC Fields to Apply**, the system applies the fixed field only, the variable fields only, or the entire constant data record (**Default:** Variable).

- **Fixed field.** Values of elements in the constant data fixed field (008 and Leader) replace corresponding elements in the authority record, unless the constant data element contains asterisks (***) in place of a value. Or select **Variable** to preserve all fixed field values

Example:

If in a constant data record you type *** in **Lang**, the **Lang** data is not replaced when you apply the constant data to the authority record.

- **Repeatable variable fields** are added to the authority record. The new field is added after any existing corresponding field.
- **Nonrepeatable variable fields** replace existing fields in the authority record.
- **Subfields:** If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the authority record.
- **Retain blank subfields in a record.** To retain empty subfield codes in a variable field in constant data, after each subfield code, type |**BLANK**|. (That is, type a vertical bar character, then the uppercase letters BLANK, and then another vertical bar). When you apply the constant data, the subfield code, followed by a space, appears in the added variable field.

Example:

"100 10 ‡b |BLANK|" in a constant data record is added to the authority record as "100 10 ‡b "

- **Retain blank subfields in a list of records.** Adding |BLANK| to subfields in a record does not retain empty subfield codes when you apply constant data to a list of records. You must add text to subfields to retain them. For example, simply add x.

3 Find authority constant data records

See also: "Use authority constant data search results."

About finding authority constant data records

You can find constant data records by:

- Specifying a name which the system requires you to assign when you create the record.
- Listing all records.
- View the default (without having to search for it) (See "Apply authority constant data" for more information)

Find specific authority constant data records by name or (local file only) by My Status

	Action
1	On the Authorities menu, click Search > Online Constant Data , or press <Alt><U><S><D>. Or Click Search > Local Constant Data , or press <Alt><U><S><C>.
2	In the Search Online [or Local] Authority Constant Data dialog in the Search for box, type a constant data record name (the Name index is already selected). Or For searching the local authority constant data file only: In the Search for box, type text you assigned to one or more constant data records as a custom My Status, and select the My Status index from the adjacent list. Tip: Assigning your name as My Status for your constant data records and then searching the My Status index for your name retrieves only your constant data records.
3	Optional. Type a second search term (constant data name or My Status), select AND, OR, or NOT to indicate how you want to combine the terms, and select the index from the adjacent list. AND: Finds records that contain both terms in the same record OR: Finds records that contain either term NOT: Finds records that contain the first term but not the second term
4	Click OK to send the search, or click Cancel to close the dialog without sending the search.

Note: The online constant data file is the same for the Connexion browser and the Connexion client. You can access your records using either interface.

Stopwords

The following words are not indexed for searching either the online or the local authority constant data file:

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

Stopwords are automatically removed from searches to make the search valid. You do not receive an error message if you include stopwords in a search. Searches that include only stopwords result in no matches.

Authorities: Use Authority Constant Data

For local file only: Set a default My Status or add My Status to a single record (optional)

Set a default My Status: If you want to set the same My Status (for example, your name) to most local constant data records (unavailable for online authority constant data), you can save time by setting a default My Status. The client automatically supplies it each time you save an authority constant data record to the local file.

	Action
1	On the Tools menu, click Options , or press <Alt><T><O>, and then click the My Status tab .
2	Under Authority Constant Data , type a note or identifier in free text (limit: 40 characters) to apply to constant data. Tip: For any particular constant data record, you can change the default My Status if needed: On the Action menu, click Set Status or press <Alt><Shift><S>. Type over the highlighted default My Status in the Enter My Status Text box or edit the default My Status.

Note: You can also set a default My Status for online and local bibliographic save file records.

Set My Status for a single local authority record:

	Action
1	With a local authority constant data record open, on the Action menu, click Set Status , or press <Alt><Shift><S>.
2	In the Set Status dialog, in the Enter My Status Text box, type an identifier or note in free text (maximum 40 characters).
3	Optional. Select the Save Record check box if you want to save the record at the same time you set the My Status. A check mark indicates that this option is selected.
4	Click OK or press <Enter> to assign or change the My Status, or click Cancel . Result: The My Status you entered displays in the record's status bar.

Authorities: Use Authority Constant Data

List all authority constant data records

	Action
1	In the Search Online [or Local] Authority Constant Data dialog (Authorities > Search > Online [or Local] Constant Data), leave all text boxes empty, or click Clear Search .
2	Click OK or press <Enter>. Tip: The constant data list is sorted alphabetically by name. For the local list, you can click the My Status column heading to re-sort by My Status if that helps you locate a record quicker. To re-sort by name, click the Name column heading.

4 Use constant data search results

How results display

Applies to online/local constant data	Number of records found	The client displays...
Online and local constant data	0	A message asking you to change or simplify the search and try again
Online and local constant data	1	The full constant data record
Online constant data only	2 to 100	An Online Authority Constant Data List sorted alphabetically by constant data name
	101 records or more	<ul style="list-style-type: none"> • A message that tells you: <ul style="list-style-type: none"> — The total number of records found — That the displayed list contains the first 100 records — How to view the next 100 (View > Next 100 Records) • A list of the first 100 records
Local constant data only	2 to 9,999	A Local Authority Constant Data List sorted in alphabetical order by constant data name
		<ul style="list-style-type: none"> • A continuous list of all local constant data records • The list is sorted by constant data name

Use the results list

Note: Changes you make to the content of a record or actions you take on a record opened from a list are not reflected in the list until you resave the record, close the list, and do the search again. The list reopens showing the updated information.

The **Online Authority Constant Data List** has two columns. Only the Name column contains data—names of the constant data records (required when you create the records)

The **Local Authority Constant Data List** has two columns:

- Name
- My Status


At the top of both list types are:

- Selection buttons for fields to apply (fixed, variable, or both)
- A button to apply constant data from a record selected in the list
- The name of your current default constant data record, if you assigned one

Hide columns or change the order

	Action
1	Right-click anywhere in a list, and on the popup menu, click List Settings .
2	<p>To hide a column: In the Column Settings dialog, select a column by its name and click Hide. Or Double-click a column to clear the check box next to its name.</p> <p>To display a hidden column: Select the column and click Show, or single-click its name.</p> <p>Default: All columns are selected.</p>
3	<p>To change the order of columns:</p> <p>Select each column you want to move, one by one, and click Move Up or Move Down until it is in the position you want.</p> <p>For default order see the section above on using the results list.</p> <p>Or use the mouse to change order of columns:</p> <p>You do not have to use the Column Settings command in the right-click menu to change the order of columns. Instead:</p> <ol style="list-style-type: none"> 1. Place the cursor over the column heading of the column you want to move. 2. Hold down <Ctrl> and left-click and drag the column heading. Or Right-click, hold and drag the column heading. <p>While you drag, the cursor becomes a rectangle.</p> <ol style="list-style-type: none"> 3. Drop the rectangle on top of the border between the two columns where you want to place the column you are dragging.
4	To restore the default order of columns and re-display all columns, click Reset .
5	Click OK to make your changes and close the dialog. Or Click Cancel to close the dialog without making the changes.

Resize columns

Action
<p>Move the cursor over the right-hand border of the heading for the column you want to resize until the cursor becomes . Then click and hold while you drag the border to a new position.</p> <p>To restore column widths to the default, right-click anywhere in the list. On the popup menu, click Reset List Sizes.</p> <p>Result: In the confirmation message, click OK to confirm, or click Cancel to keep the column widths as they are. After you close the list and reopen, the original column widths are restored.</p>

Re-sort a list

Action
Click the column heading to sort by constant data name or My Status. Or On the View menu, click Sort By > Constant Data Name , or press <Alt><V><S><D>.
Note on online constant data lists only: For lists of more than 100 records, sorting applies only to the 100 records currently displayed. If you display another set of 100 records, you must re-sort the list.

Online constant data list only: View a list of more than 100 records

The client shows only 100 records at a time when results exceed that number. To view search results of more than 100 records:

Action
To view the next 100 records in the search results list, on the View menu, click Next 100 Records , or press <Ctrl><Alt><Shift><V>, or press <Page down>. Or To view the previous 100 records, on the View menu, click Previous 100 Records , or press <Ctrl><Alt><Shift><U>, or press <Page up>.
Tip: Check the status bar to see where you are in the list of total records found. For any record selected on the list or opened for display, the status bar shows the record number of the total number of records found (for example <i>22 of 24</i>).

Select multiple records in a list

Action
Select adjacent records: Click to highlight the first entry, and then press and hold <Shift> and click the last entry. The entire group of records between the entries is selected. Or Click an entry and hold the mouse button down while you drag the cursor up or down in the list to select the group of records you want.
Select nonadjacent entries: Click to highlight the first entry. Then press <Ctrl> and click to highlight each additional entry.

Authorities: Use Authority Constant Data



Print a list or selected entries You can print an entire list or print selected entries on a list:

	Action
1	With an Online Authority Constant Data List or a Local Authority Constant Data List open, on the File menu, click Print List , or press <Shift><F12>. Or Select only entries you want to print. and then on the File menu, click Print List , or press <Shift><F12>.
2	If you have more than one record selected, the Print List dialog opens. Click the button next to All to print all records in the list. Or Click the button next to Selected Items to print only records you selected in the list. Otherwise, go to step 3.
3	In the Print dialog, click Print or press >Enter>. Note for online constant data list only: If results exceed 100 records, the client prints only the set of currently displayed records. You must display other sets in the list to print them.

Note: Connexion client uses Internet Explorer (IE) to print records and lists. Therefore, page margins for printing are determined by IE Page Setup settings. To adjust the margins, open the browser, and on the File menu, click **Page Setup**. You can determine other print settings (for example, portrait or landscape orientation) in the client Print dialog.




For general information on using lists in Connexion client, see Basics, Use Client Interface, "Record lists."

Open records in a list

Action
In an Online [or Local] Authority Constant Data List, double-click the entry, or click to highlight the entry and press <Enter>. <ul style="list-style-type: none">To open the next record without returning to the list, on the View menu, click Forward, or click , or press <F9>.To open the previous record, on the View menu, click Back, or click , or press <Shift><F9>.

Note on records in local file: More than one person can use a shared local file at the same time, but only one person can open a record in a local file. If you try to open a record already opened by another person, the client gives you a message that someone else is using the record.

Print a record

Action
<p>With a record open, on the File menu, click Print, or click , or press <Shift><F12>, or press <Alt><F><P>.</p> <p>Results:</p> <ul style="list-style-type: none"> If you click , the record prints immediately using your default Windows printer, unless you elected to print records to a file (Tools > Options > Printing). Otherwise, the Print dialog opens. Your default Windows printer is selected, but you can select any printer from the list of printers installed on your workstation. <p>In the Print dialog, click OK or press <Enter> to print the record.</p> <p>Or</p> <p>Available for local constant data lists only:</p> <p>Select records in a list that you want to print separately (hold <Shift> and click for adjacent records or hold <Ctrl> and click for non-adjacent records). On the File menu, click Print, or click , or press <Ctrl><P>.</p> <p>Result: The records print immediately using your default Windows printer, unless you selected to print records to a file (Tools > Options > Printing).</p>

Note: See Note above about adjusting page margins for printing.

For general information on using records in Connexion client, see Basics, Use Client Interface, “Records.”



Navigate among records and lists

When you have multiple records and lists open, you can use commands on the View and Window menus, or equivalent toolbar buttons or keystroke shortcuts, to navigate among the open windows. See “Record lists” for procedures.

Actions on authority constant data records

The following table shows actions you can take on single authority constant data records or on multiple records selected in a constant data list:

Action	Available in ... logged on? offline?	How to
Print records or a list	Online constant data And Local constant data (logged on or offline)	See sections above about printing a record and printing a list

Action	Available in ... logged on? offline?	How to
Set default constant data	Online constant data And Local constant data (logged on or offline)	With an online constant data record open, on the Edit menu, click Constant Data > Online > Set as Default , or press <Alt><E><D><O><D>. Or With a local constant data record open, on the Edit menu, click Constant Data > Local > Set as Default , or press <Alt><E><D><L><D>.
Derive new record from existing authority or constant data record	Online constant data And Local constant data (logged on or offline)	With an authority record or authority constant data record open, on the Edit menu, click Derive > New Constant Data , or press <Ctrl><I>.
Edit record	Online constant data And Local constant data (logged on or offline)	Open a constant data record and edit or add content as needed.
Save record	Online constant data And Local constant data (save to online file only when logged on)	With a constant data record open, or with records selected in an online or local constant data list: On the Action menu, click Save Record to Online File , or press <Ctrl><Alt><V> (must be logged on). Or Click Save Record to Local File , or press <F4>.
Add or change My Status	Local constant data only (logged on or offline)	With a constant data record open, or with records selected in a local list: 1. On the Action menu, click Set Status , or press <Alt><Shift><S>. 2. In the Enter My Status Text box, type a new My Status, or edit or replace a My Status (40 characters maximum). 3. Click OK or press <Enter>.
Delete record	Online constant data And Local constant data (logged on or offline)	With a constant data record open, or with records selected in an online or local list: 1. On the Action menu, click Delete Record ,  or click  , or press <Ctrl><Alt><D>. 2. Click Yes to confirm.

Action	Available in ... logged on? offline?	How to
Move record (between local files only)	Local constant data only (logged on or offline)	<p>With a local constant data record open or with records selected in a local constant data list:</p> <p>On the Action menu, click Move Record, or press <Alt><A><V>.</p> <p>Note: Local constant data records cannot be copied within the same file, since each record must have a unique name. To copy a record within the same file, use Edit > Derive > New Constant Data to create a copy with a different name.</p>

For summaries on applying default constant data, applying constant data by name, or applying constant data from a list, see Authorities, Save Authority Records, “Save authority records.”