

Authorities: Edit Authority Records

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Revision History

Date	Section title	Description of changes
August 2007	Throughout	Added minimum authorization level required for specific editing procedures, as appropriate
	8 Authorization levels and cataloging capabilities	Revised to: <ul style="list-style-type: none">• Clarify authorized actions on records by levels of authorization• Clarify any differences in authorized actions between the client and browser interfaces Formerly titled "Editing modes and privileges"
June 2007	1 Edit authority records	<ul style="list-style-type: none">• Revised for new submenu called Cut Copy Paste on the Edit menu that contains most existing basic editing commands• Added new command available only on the right-click editing menu for inserting Unicode Formatting Control Characters for managing correct display of bidirectional data in Arabic and Hebrew script records• Added new bibliographic institution record and list type to types of records and lists that remain open simultaneously without "pinning"
	3 Validate records	<ul style="list-style-type: none">• Minimum level of validation for Holdings actions on bibliographic records is called Structure (replaces "None" option)• Validation options (Tools > Options > General; click Validation Level Options) apply only to automatic validation performed by the system when you take certain final actions on records• Edited procedure for setting validation options (which now also include separate options for bibliographic institution records)
	6 Insert diacritics	Added a section at the end about using RLIN21 Latin keyboard as an alternative to the client Edit > Enter Diacritics function.
	7 Default keystroke shortcuts for diacritics	Added a section at the end about possible conflicts between default client keystroke shortcuts and keystroke shortcuts used with the installed RLIN21 Latin keyboard

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1 Edit authority records

Edit record in MARC template view

No minimum authorization is required to edit records locally. You need a NACO or higher authorization level to create and add or edit and replace master authority records. See “Authorization levels and cataloging capabilities” in this guide for more information.

The Connexion client displays records in one view only: MARC template. The following list describes how to use the template view for editing:

- The template displays data in cells that enclose field number, each indicator, and field data separately.
- When you enter data in a field, the cursor automatically moves from the tag cell to the first indicator cell, to the second indicator cell, and then to the field data cell as you enter data in each. You do not enter spaces between each cell, and you do not need to <Tab> from cell to cell unless you want to skip to the next cell without entering data.
- When you click to place the cursor in a cell that has a set number of characters (tag, indicator, or fixed field element), the client automatically highlights the entire contents of the cell if it contains data, since you cannot enter additional characters without deleting existing characters. If you want to change only one character of several in one of these cells (for example, you want to change one number in the tag), click to highlight the contents of the tag cell, then click again to place the cursor before or after the particular number or character you want to replace, and then edit.
- When you click to place the cursor in a variable field cell, the client does not highlight data. You can double-click a word to highlight it or triple-click to highlight all data in the field, just as you do in a word-processing program.

Caution: Highlighting with the mouse from right to left to delete a field may shift data in next field.

If you highlight an entire field in a record using the mouse moving right to left and then delete the text, data in the next field may shift to incorrect cells. Use the shortcut keystroke <Alt><Delete> to delete the entire field without highlighting, or highlight the field from left to right.

- Otherwise, you **edit the data as though it is continuous text**. For example, if you copy an entire field and paste it into a blank field, the client formats the data correctly, putting the tag number, indicator values, and field data in the appropriate cells. You do not have to copy and paste the data one cell at a time.
- Edit using the mouse; that is, by clicking commands on menus or by clicking buttons on the toolbar. Or you can edit using keystrokes (see also, “Keystroke shortcuts for editing.”)

For more details about working with records—for example, about how records display when you edit them or how to change the way records display—see Basics, Use Client Interface, “Records.”

Tip: To compare the original record to your edited copy:

- Save your edited record to the local save file and then search for the original record again.

Or

- Open another copy of the client and search for the original record in the second client window.

Editing tools: constant data, text strings, MARC field Help, authority history records, spell checker, ALA character entry and more

The Connexion client provides the following editing tools:

- **Constant data.**

Create (**Authorities > Create > Constant Data**) and apply constant data records (**Edit > Constant Data > Online >[or Local] > [Apply Default or Apply from List]**) to avoid rekeying data you use frequently in records.

See Authorities, Use Constant Data, “Apply constant data” for more information.

- **Text strings.**

Create and enter text strings for data you use frequently (shorter form of constant data) (**Tools > Text Strings** or use the **Text String** quick tool on the toolbar).

See Basics, Set Options and Customize, “Create custom text strings” for more information.

- **MARC field Help.**

Look up a specific MARC field description for any field you are working on, via a command that links to Web-based MARC documentation (**Help > MARC Field Help** or <Shift><F1>).

See “Use Help” in Basics, Set Options and Customize for more information.

- **LC authority history records**

To track the history or identify past changes for LC distributed authority records, open authority history record(s) or search or browse the authority history file, for example, to check for headings you can no longer find in the LC authority file.

- **Spell checker**

Check spelling records. Customize the spell checker.

- **ALA diacritic and special character entry**

See “Insert diacritics and special characters and “Default keystroke shortcuts for diacritics and special characters.”

Example: To enter a subfield delimiter, press <Ctrl><D>.

- See also in this booklet:

- Validate records
- Reformat records




- See also in this topic:
 - Copy control number
 - Find/replace text

Tip: For NACO participants, when you work with **bibliographic** records online and find mistakes in controlled headings, you can open and lock the master authority record directly from the name heading field to edit and replace:

With the cursor in the name heading field of the bibliographic record, on the Action menu, click **Lock Linked Authority Record**, or press <Alt><A><I>.

Text editing commands



The following table lists client commands on the **Edit > Cut Copy Paste** menu for moving the cursor and working with fields and data in fields:

To...	Use this Edit menu command	How to:
Cut selected text and copy it to the Windows clipboard	Cut	Highlight text and click Cut or  , or press <Ctrl><X>. Or Use the right-click menu: Right-click the selected text, and on the popup menu, click Cut .
Copy selected text to the Windows clipboard	Copy	Highlight text and click Copy  , or press <Ctrl><C>. Or Use the right-click menu: Right-click the selected text, and on the popup menu, click Copy .
Copy selected text to the Windows clipboard in plain text (ASCII) format (for pasting into non-Unicode applications)	Copy as Text	Highlight text and click Copy as Text , or press <Alt><E><O>.
Paste cut or copied text at the cursor location	Paste	Place the cursor where you want to paste, and click Paste , or click  , or press <Ctrl><V>. Or Use the right-click menu: Right-click at the cursor location where you want to paste, and on the popup menu, click Paste .

To...	Use this Edit menu command	How to:
Paste all of the data copied from a Web site into a single field (automatically removes paragraph markers and line breaks which cause the copied data to be pasted into separate fields if you use generic Paste)	Paste Unformatted	Place the cursor where you want to paste, and click Paste Unformatted , or press <Alt><E><S>. Or Use the right-click menu: Right-click at the cursor location where you want to paste, and on the popup menu, click Paste Unformatted .
Delete the current* field	Delete Field	Click Delete Field , or press <Alt><Delete>. Or Use the right-click menu: Right-click in the field you want to delete, and on the popup menu, click Delete Field .
Copy the current* field	Copy Field	Click Copy Field , or press <Alt><Insert>.
Cancel all changes to the current* record since you opened it	Cancel Changes	Click Cancel Changes , or press <Ctrl><Shift><Z>.
Cancel the last edit in the current* cell	Undo	Click Undo , or press <Ctrl><Z>.
Insert a blank field above the current* field	Insert Field/ Above Current Field	Click Insert Field > Above Current Field , or press <Shift><Enter>.
Insert a blank field below the current* field	Insert Field/ Below Current Field	Click Insert Field > Below Current Field , or press <Enter>.
Move the current* field up one position	Move Field/Up	Click Move Field > Up , or press <Alt><Up arrow>.
Move the current* field down one position	Move Field/ Down	Click Move Field > Down , or press <Alt><Down arrow>.
Move the cursor to the previous record area	Previous Record Area	Click Previous Record Area , or press <Shift><F6>

To...	Use this Edit menu command	How to:
Move the cursor to the next record area	Next Record Area	Click Next Record Area , or press <F6>.
* Note: The terms "current field" or "current cell" refer to the field or cell where the cursor is located. The term "current record" refers to the active or topmost record.		

Editing markers:

- The client shows which field is active (where the cursor is located) with a boxed outline.
- The client marks each variable field you edit with the symbol  or adds  to the fixed field if you edit one or more elements (the marker appears only when the fixed field is displayed on top or bottom (**View > OCLC Fixed Field > Top or Bottom**)).
- The editing symbol remains displayed until you take final actions or perform the Control All Headings function on the records. For NACO-authorized libraries: Note that the editing marks are not retained when you Add a record to the LC authority file.
- See more details in Use Client Interface, “Records,” “Record display features.”

Right-click shortcut menus

Right-click in a record to open a popup shortcut menu to do any of the following actions shown in boldface (others not in boldface type are available only for bibliographic records):

- Undo*
- Cut*
- Copy*
- Paste*
- Paste Unformatted*
- Delete Field*
- Copy Field*
- Copy Control Number*
- Control Single Heading
- Uncontrol Single
- Transliterate > Arabic [or Persian]
- Right-to-left Reading Order
- Insert from Cited Record
- Edit with Guided Entry

- Insert Unicode Control Characters > [submenu of available characters]

(These characters are available only on the right-click menu; they control bidirectional text in Arabic and Hebrew script records; see more in Cataloging, International Cataloging, “Use Arabic scripts for cataloging”)

- Link fields
- Unlink fields
- MARC Field Help*

*Commands marked with asterisks are available for both bibliographic and authority records; if no asterisk, available for bibliographic records only

Except for Unicode Formatting Characters, these commands are also on client menus. See a complete list of client commands in Basics, Use Client Interface, “Menus (commands, keystroke shortcuts, and toolbar buttons).”

Right-click in a list to open a popup menu to:

- Copy (copies the text from the selected entry, with columns separated by tabs and rows starting on new lines)
- Select All
- List Settings (opens a list of columns to re-order or show/hide)
- Reset List Sizes (to default)

See more about customizing lists in Basics, Use Client Interface, “Record lists.”

Move to next record area

The client record display has three main areas

- Record information area
- Fixed field
- Variable fields

For a description of the areas, see “Records” in Client Basics/Use Client Interface.

To move the cursor from one area to another:

Action
On the Edit menu, click Next Record Area , or press <F6>.
Result: The cursor moves to the first element or field of the next record area, or if the cursor was in a particular variable field to start with, it returns to that field when you return to the variable fields area.

Change the position of the fixed field or display as variable fields

You can change the position of the fixed field in the record display or display it as variable fields.

Action
<p>On the View menu, click OCLC Fixed Field > Top, or press <Ctrl><V><O><T>. The fixed field displays above the variable fields.</p> <p>Or</p> <p>Click OCLC Fixed Field > Bottom, or press <Ctrl><V><O>. The fixed field displays below the variable fields.</p> <p>Or</p> <p>Click OCLC Fixed Field > Display as Variable Field, or press <Ctrl><V><O><D>. The fixed field displays as variable fields LDR (leader), 001, 005, and 008.</p>

Use fixed field drop-down lists

By default, when the fixed field display is set to **Top** or **Bottom**, each fixed field element has a drop-down list of values that are valid for the MARC format of the record.

To use the lists:

Action
<p>Click the cell of a fixed field element to display the list, and then click the arrow to display the values in the list. Select a value.</p> <p>If preferred, type a value over a selected value in the fixed field element box.</p> <p>See more about navigating fixed fields in Basics, Use Client Interface, "Records."</p>

If you prefer not to use the fixed field lists, clear the display:

	Action
1	On the Tools menu, click Options (or press <Alt><T><O>), and then click the Record Display tab .
2	Click to clear the Use dropdowns for fixed fields check box. Click another format in the list. Default: Check box is selected

Fields restricted for editing

You cannot edit the following fields in an existing authority record. If you try to change these fields, the OCLC Cataloging system cannot validate the record.


- Leader byte 5 (Rec Stat)
- Leader byte 6 (Type)
- 008 field positions 0-5 (Entered)
- 001 field (ARN)
- 005 field

- 010 field (LCCN)
- 035 field
- 040 field cannot be changed except to add *\$b eng*

Copy control number To copy the OCLC control number of the active bibliographic record or the ARN of the active authority record (field 001):

Action
<p>On the Edit menu, click Cut Copy Paste > Copy Control Number, or press <Ctrl><T>.</p> <p>Or</p> <p>Use the right-click menu: Right-click in the record, and on the popup menu, click Copy Control Number.</p>
<p>Result:</p> <p>The number is on the Windows clipboard, and you can paste it into any text area or document.</p>

Find and replace text To find instances of text in a record and replace it with other text:

	Action
1	On the Edit menu, click Find/Replace , or click  , or press <Ctrl><F>.
2	In the Find What text box, type the text you want to find. Tip: If you select the text you want to find before step 1, the client places the highlighted text in the Find What box for you.
3	In the Replace With text box, type the text you want to insert in place of the "found" text.
4	Optional. To enter a diacritic or special character in the text, click Enter Diacritics . See "Insert diacritics and special characters" for more details.
5	Optional. Select parameters for the search: <ul style="list-style-type: none"> • Click the Match Case check box to match upper- and lowercase exactly of the text you want to find and the text you want to replace. • Click the Whole Word check box to match the text in the Find What box with whole words only. • Click the Search Backward check box to search backward from the cursor position rather than forward.
6	Click Find Next to find the next occurrence of the text in the Find What box. The client finds and highlights the text if found.
7	Click Replace to replace the found text with the text in the Replace With box. Or Click Find Next to find the next instance. Repeat until the client has searched the text of the entire record and you have replaced the text where needed. Or Click Replace All to replace all instances of the found text. Or Click Cancel to stop the find and replace process.

Open and view multiple record and list windows: When to pin

The system automatically keeps records and search results lists from different databases open in separate windows. For example, a WorldCat record or list opens in one window, a save file record or list opens in another, and an LC authority file record or list opens in another:

- Cycle through all open windows using <Ctrl><Tab> or <Ctrl><F6>.
- "Pin" a record open if you want to keep multiple records of the same type open at the same time.

Open simultaneously without pinning

When you retrieve a record or list from any of the following databases or files, they all stay open at the same time:

- WorldCat
- Online bibliographic save file
- Local bibliographic save file
- Online bibliographic constant data
- Local bibliographic constant data
- Bibliographic institution records (WorldCat)
- LC authority file
- Online authority save file
- Local authority save file
- Online authority constant data
- Local authority constant data



In addition, you can open simultaneously:

- Bibliographic workform
- Bibliographic constant data workform
- Authority workform
- Authority constant data workform

Pin records to open more record windows of the same type

If you open a second record from the same online file or database or a second workform of the same type, the first closes (it is replaced in the open window). If you edited the first record or the record is a workform, the client prompts you to save changes before closing it.

To keep more than one record or workflow open, first "pin" the current record or workflow open, and then open another:

Action	
1	Click the record or workflow window you want to pin to make it the active window, if necessary.
2	<p>On the View menu click Pinned, or press <Shift><F4>.</p> <p>Results:</p> <ul style="list-style-type: none">• The record's title bar contains the icon  and the word <i>[pinned]</i> to indicate that it is pinned.• When a pinned record is the active record, the command Pinned on the View menu is marked with a check mark.• The record remains pinned open until you close it.• You can open another record from the same online database or file or another workflow of the same type. The newly opened record's title bar does not contain the word <i>[pinned]</i>. The title bar contains the icon  to indicate that it is unpinned.

For more about the options for viewing records and lists, see also, Basics, Use Client Interface, "Records" and "Record lists."

To unpin a pinned record window and close it:

Action
<p>On the View menu, click Pinned (check-marked), or press <Shift><F4>.</p> <p>Or</p> <p>Simply close the record window: click X in the upper right corner, or press <Alt><F4>.</p> <p>Results:</p> <ul style="list-style-type: none">• If unedited, the record closes immediately.• If you edited the record, the client prompts you to save changes before closing the record.• Unpinning a record or workflow always closes it.

Prompts to save edited records

If you log off without saving workforms or edited records, or if you close a workform or an edited unsaved record, the system asks if you want to save changes. You get a separate prompt for each open, unsaved edited record or workform.

Depending on the origin of the record and whether you are online or offline, the client prompts you as follows:

If edited record or workform is from ...	And you are ...	The client prompts you to save to ...
Local save file	Logged on or offline	Local save file
Online save file	Logged on	Online save file
Authority File	Logged on	Local save file or online save file

If asked to save to the online save file, or if asked to save to the local save file:

Action
<p>Click Yes to save the record(s).</p> <p>Results:</p> <ul style="list-style-type: none"> • The client saves the record and closes it if you save to the local file. • If you save to the online file, the client closes the record and gives you the bibliographic save file number. • When you have responded to all open records, the client logs you off. <p>Or</p> <p>Click No to log off and discard unsaved changes.</p>

If asked to save to either the online or local save file:

Action
<p>Click Online or click Offline to save to the online save file or the local save file, respectively.</p> <p>Results:</p> <ul style="list-style-type: none"> • The client saves the record and closes it if you save to the local file. • If you save to the online file, the client closes the record and gives you the bibliographic save file number. • When you have responded to all open records, the client logs you off. <p>Or</p> <p>Click Close to close the record and discard unsaved changes.</p>

For more information about saving records, see Authorities, Save Authority Records, "Save authority records."

Authorities: Edit Authority Records

LCCN format details (field 010)

No hyphen, 1-3 leading blanks in unoccupied prefix positions, 1-5 leading zeros in unoccupied number positions, trailing blank in position 12 (pre-2001 LCCNs only)

The following tables provide details on required data entry formatting for both pre-2001 LCCNs (2-digit year) and current LCCNs (4-digit year):

LCCN segment	Pre-2001 LCCN Length and position of segment	2001 and later LCCN Length and position of segment
Alphabetic prefix	Up to 3 letters Positions 1 through 3 1 to 3 leading blanks fill unoccupied positions Note: Prefix with 1 or 2 letters appears with letter(s) left-justified. But you must enter blanks in the LCCN prefix before the letters	1 or 2 letters Positions 1 and 2 1 or 2 leading blanks fill unoccupied positions Note: Prefix with 1 letter appears with letter left-justified. But you must enter the blank in the LCCN before the single letter.
Year	2 digits Positions 4 and 5	4 digits Positions 3 through 6
Serial number	1 to 6 digits Positions 6 through 11 1-5 leading zeros fill unoccupied positions	1 to 6 digits Positions 7 through 12 1-5 leading zeros fill unoccupied positions
Supplement blank	1 blank after last digit of serial number Position 12	Not needed
Examples	abc98123456_ _ab98003456_ __a98000056_	ab2002123456 a_2002003456 __2002000056

LCCN type	Pre-2001	2001
No prefix	Enter: __74001513_ Display: 74-1513	Enter: __2002277579 Display: 2002-277579
1-letter prefix	Enter: a_25000020_ Display: a25-20	Enter: a_2001336783 Display: a2001-336783
2-letter prefix	Enter: cd_25000020_ Display: cd25-20	Enter: cf2002701624 Display: cf2002-701624
3-letter prefix	Enter: agr25000020_ Display: agr25-20	Not used in post-2000 LCCNs.
Number 1 digit	Enter: __85000002_ Display: 85-2	Enter: __2001000002 Display: 2001-2
Number 2-5 digits	Enter: __00042732_ Display: 00-42732	Enter: __2001058650 Display: 2001-58650
Number 6 digits	Enter: 0__00687172 Display: 00-687172	Enter: __2002277579 Display: 2002-277579

2 Reformat records

About reformatting records

The Connexion client displays records in one view only: MARC template.

Use the **Reformat** command (Edit menu) as you edit online or local records to automatically re-sort the variable fields in correct numeric order and correct minor errors. Reformat records as a separate step (**Edit > Reformat**) while logged on or offline, or let the system reformat the record automatically when you take a final action interactively or batch process final actions.




No minimum authorization level is required to reformat records.

Reformat the following types of records:

- WorldCat
- Bibliographic save file (online or local)
- Bibliographic constant data (online or local)
- Library of Congress (LC) authority file records
- Authority save file (online or local)
- Authority constant data (online or local)

Note: Reformatting does not reset the automatic logoff timer when you are logged on, since the function is performed locally within the client and not by the online system.

Reformat a record by command

Action
On the Edit menu, click Reformat , or click  , or press <Ctrl><R>.
Result:: After reformatting, the client retains the  symbol to mark the fields you edited. The  symbol is retained until you take a final action or do a Control All Headings function on a record.

Errors corrected automatically

Whether you reformat records as a separate step (**Edit > Reformat**) or let the system reformat records automatically when you take final actions, Connexion makes the following minor corrections::

- For bibliographic and authority records:
 - The "pipe" character (|) in URLs is automatically converted to code %7C, since it is not part of the set of ALA diacritics and special characters that are valid in the client.
 - If you enter subfield codes in uppercase, Connexion changes them to lowercase.

- For bibliographic records only:
 - If you enter fixed field values in the wrong case, upper- vs. lowercase, Connexion changes them to the correct case.
 - If the last character (check digit) in the ISBN or ISSN is a lowercase **x**, Connexion changes it to uppercase.
 - If you enter **dlc** in lowercase in field 040 ‡a, Connexion changes to uppercase **DLC**.
 - If field 260 ‡c contains a date and fixed field element Date1 is blank, Connexion adds the date to Date1.
 - Connexion deletes leading blanks or blanks between values in fixed field elements. Trailing blanks remain.
- Non-ALA character in URLs

To retain the vertical bar or pipe in URLs, the character is automatically converted to the hex value of %7C, since it is not part of the set of ALA diacritics and special characters that are valid for use in the client.

3 Validate records online or offline

About validation

Validation checks the quality of bibliographic and authority records and prevents records with errors from being added to or replaced in WorldCat or the Library of Congress (LC) name and subject authority file.

Minimum authorization level: Validating records requires a Limited or higher authorization.

- **Manual validation by command.**

Use **Edit > Validate** to identify errors in the structure or data of records.

—Validate a single record in the online or local save file.

Or

—Validate records selected in an online or local save file list.

- **Automatic system validation for adding new records to WorldCat or to the LC authority file and for replacing master bibliographic or authority records.**

When you take a final action interactively or via batch, the system automatically validates the record.

—If interactive validation detects errors in a record, you must correct them and then try again to take the final action.

—If batch actions on records fail validation, the client produces a batch action report that shows validation errors that you must correct before re-running the batch.

- **Validation options for setting holdings for bibliographic records and for exporting bibliographic and authority records.**

By default, existing records are validated only at the most basic level (option is set to Structure) when you take the following Holdings actions:

—Update Holdings

—Produce and Update Holdings

—Alternate Produce and Update

—Replace and Update Holdings (however, full validation **always** occurs for the Replace part of this dual command)

By default, neither bibliographic nor authority records are automatically validated for Export (option is set to None).

For these actions, you can set the level of automatic system validation.

(If you use bibliographic institution records, see more about setting validation options for those records.)

- **Validation does not generally correct or move data.**

—If you enter an ISBN (field 020), CODEN (field 030), or ISSN (field 022) with errors, the system displays the validation errors. It does not move the number

to ‡z (for the ISBN or CODEN) or to ‡y (for the ISSN). You must correct the numbers.

- If you enter two fields with same tag for non-repeatable fields (for example, two 100, 110, or 245 fields) the system displays validation errors. It does not move the duplicate field to the corresponding 7xx or 245. You must make the corrections manually.
- Validation does make some minor automatic corrections in records (see details below).

- **Requirement for offline validation: Internet connection.**


Even though you are not required to log on to do manual validation offline using **Edit > Validate**, you must have an Internet connection on your workstation. The client uses the Internet during its internal process.

- **No validation for constant data.**

You cannot manually validate constant data records using **Edit > Validate**, nor does Connexion run any automatic validation for constant data records.

Validate record(s) manually by command

Use the **Validate** command as a separate step to validate a record or records selected in an online or local save file list when you are either logged on or offline:

	Action
1	<p>On the Edit menu, click Validate, or click , or press <Shift><F5>.</p> <p>See “Errors detected” below for a list of validation checks.</p> <p>Results:</p> <ul style="list-style-type: none"> • The Validate status is shown in the status bar of the record or in the Validate column for selected entries in a list (<i>C</i> = Completed, <i>F</i> = Failed). • For a valid displayed record (status <i>C</i>), the system redisplay the record. • For an invalid record (status <i>F</i>), the Validation Error Messages window opens. to report the type(s) of error and the fixed field element(s) or variable field(s) that are invalid. <p>Example: <i>130 occurs too many times (field 130, occurrence 2)</i></p> <ul style="list-style-type: none"> • For records selected in a list, the Validation Results window lists results for all records by each record's save file number and by which file the record is in, the local or online save file. <p>Example: <i>Online #52</i> <i>130 occurs too many times (field 130, occurrence 2)</i></p> <ul style="list-style-type: none"> • View or print the Validation Results list, fix the errors, and validate the records again. To print, click Print.
2	<p>Correct any errors and the retry validation.</p> <p>Tip: To toggle between the list of validation error messages and the open bibliographic record, press <Ctrl><Tab> or <Ctrl><F6>.</p>

See note above about the requirement for an Internet connection to validate records while offline.

Notes:

- Validating a record disables the **Undo** command.
- Validation level options you select in **Tools > Options > General** (click **Validation Level Options**) apply only to automatic system validation. The options do not apply when you validate records manually using **Edit > Validate**.

Automatic validation on final actions

The following table describes the automatic validation process for final actions on records processed interactively or via batch:

Final action	Validation performed
Bibliographic records	
Update Holdings	<p>For existing records: No automatic validation by default.</p> <p>Select validation level for these actions in Tools > Options > General / Validation Level Options.</p> <p>Note: When you update holdings, even with validation level set to Structure (the minimum), the system verifies that:</p> <ul style="list-style-type: none"> • Indicators • The following fields are present and, for some, checks for valid data: <p style="padding-left: 40px;">Leader, 001, 005, 008, 040 ꞵc, 049 and 245 ꞵa or 245 ꞵk</p> <p>If these structure checks fail, you receive an error message with a list of validation errors.</p> <p>For workflows: Always validates the complete record, whether or not you edited the record.</p>
Produce and Update Holdings	
Alternate Produce and Update Holdings	
Replace Record	Validates edited fields only.
Replace and Update Holdings	Validates edited fields only for the Replace action.
Export	By default, no automatic validation.
Delete Holdings	Does not validate records.
	Note: Same note as for Update actions also applies to Delete Holdings.

Final action	Validation performed
Authority records	
Add Record*	Validates the entire record.
Replace Record*	Validates edited fields only.
Export	By default, no automatic validation. Optional. Select validation level for exporting records in Tools > Options > General / Validation Options.
<p>*Note on adding or replacing authority records: Check for duplicate 1xx headings when you add or replace a name authority record.</p> <p>As part of automatic validation for new or replaced name authority records, the system compares the established heading (1xx field) in the new/modified record with 1xx headings in all name authority records. The system also compares the 1xx heading in the new/modified record with 4xx cross-references present in the same record or any other record(s).</p> <p>If a normalized heading in the 100, 110, 111, or 130 field of the new/modified name authority record matches another 1xx heading or a 4xx cross-reference, the new/modified record fails validation and the system displays the following message:</p> <p><i>This main entry exists in another authority record: LCCN=[LCCN] ARN=[ARN]</i></p> <p>To resolve the error, you must modify one of the records to differentiate them.</p> <p>Currently, the system does not compare 4xx headings in new/modified records to 1xx headings in existing name authority records.</p>	

Notes:

- Automatic validation that occurs when you take actions immediately while logged on produces the same results as when you use the **Validate** command (Edit menu) interactively as a separate step.
- Automatic validation that occurs when you batch process record actions produces a batch action report that shows detailed information for both records with failed actions and those with successful actions.
- See more about automatic validation for actions on bibliographic institution records (IRs) if you use IRs in the Use Bibliographic Institution Records guide.

Set validation level for record actions

To change the system validation level for record actions:

	Action
1	On the Tools menu, click Options , or press <Alt><T><O>. Then click General .
2	Click Validation Level Options .

	Action
3	<p>Under Bibliographic Master Records, in the Set Holdings list, select one of the following levels:</p> <ul style="list-style-type: none"> • Structure (default) (see note in table above describing minimal validation at this level) • Basic (checks for the validity of elements, length, repeatability, type of data or codes, etc.) • Full (in addition to basic level check, checks for relationships between elements) <p>The options setting applies when you use the following commands:</p> <ul style="list-style-type: none"> • Update Holdings • Produce and Update Holdings • Alternate Produce and Update • Update Holdings (as part of Replace and Update Holdings) <p>The option setting does not apply when you validate manually using Edit > Validate.</p>
4	<p>In the Export list under Bibliographic Master Records and in the Export Authority Record list, select None (default), Basic, or Full.</p> <p>Note: See separate information on bibliographic institution record validation if you work with these records in Cataloging, Use Bibliographic Institution Records, “Create, delete, or take other actions on bibliographic institution records.”</p>
5	<p>Click OK to apply your settings or Cancel to cancel changes.</p>
6	<p>In the General page, click OK to save changes you made, or click Cancel to cancel changes, or click Apply to save changes and keep the Options window open.</p>

Notes and Tips:

- With the automatic validation level set to **Structure** or **None**, you do not have to stop and fix errors before completing the actions.
- When you keep the default validation level, you can always run full validation manually using **Edit > Validate** (or <Shift><F5>).
- If you set the automatic validation level to **Basic** or **Full**, you must correct errors to complete the actions.
- No automatic validation occurs when you use Delete Holdings.
- This option setting does not apply when you update holdings using **Batch > Holdings by OCLC Number** on bibliographic records. This process does no validation because records are not downloaded or accessible for you to do any needed corrections.

Errors detected during online or offline validation

Online validation checks:

- Valid fixed-field values, tags, indicators, and subfields, as defined in *OCLC-MARC Records and Bibliographic Formats and Standards*.
- Valid combinations of fixed-field values, tags, indicators, and subfields.
- Repeatability and nonrepeatability of tags and subfields.

- Valid number of characters in fields and records. The number of characters in a field cannot exceed 9,999. The number of characters in a record cannot exceed 99,999.

Note: These size limits are defined by MARC21 standards. Valid characters are defined in *OCLC-MARC Records*.

- Valid structure in some non-textual variable fields, for example, 006, 010, 020, 022, 030, and 040. Non-Latin script characters, if present.
- Valid non-Latin script characters, if present.

Alternative: To check the validity of characters alone, separately from validating records, use **Edit > MARC-8 Characters > Verify**. For details, see International, "Use non-Latin scripts for cataloging," "Verify MARC-8 characters."

Offline validation checks:

- Same checks of record format and content as for online validation.
- However, because you are not logged on, cannot verify specific actions on records that are defined by your authorization, such as edits to a record that are restricted to a particular cataloging level (for example, CONSER level upgrades) and Replace capabilities.
- Records may pass offline validation, but the final actions you take may fail.

Note: An Internet connection is required to validate records offline.

Automatic correction of minor data errors (bibliographic records only)

Connexion corrects the following minor errors when you validate a bibliographic record as a separate step (**Edit > Validate**) or take a final action and let the system validate the record automatically:

- If you enter fixed field values in the wrong case, upper- vs. lowercase, the system automatically changes them to the correct case.
- If the tenth character (check digit) in the ISBN or ISSN is a lowercase **x**, the system automatically changes it to uppercase.
- If you enter **dlc** in lowercase in subfield a of field 040, the system automatically changes to uppercase.

Expanded editing capabilities: no validation errors

As a result of system changes in mid-2005, the following activities no longer produce error messages:

- **Adding call numbers and headings.** You can add a call number or subject heading(s) to a master record, regardless of your library's profile, as long as that call number or subject heading scheme is not already present in the record.

Example: If you are profiled to add LC subject headings only, you can also add NLM subject headings as long there are no NLM subject headings present in the record.

- **Editing unlocked records.** If you edit an unlocked record and plan to replace it, you no longer receive a validation error message on an element that you are authorized to add, change or delete.

Example: If you have a CONSER or National Enhance authorization, you can now add, change or delete field 042 and validate without receiving a validation error on the record

4 Check spelling in records

Check spelling Use the client spell checker to verify English language spelling in records;

	Action
1	Display a bibliographic or authority record or workform, and on the Tools menu click Check Spelling , or press <F7>.
2	<p>If the spell checker finds a word that requires attention (based only on the spell checker dictionary), the Spell Check dialog box opens with the word displayed in the Not in Dictionary text box. In the record, the spell checker highlights the field containing the word.</p> <p>Take one of the following actions:</p> <ul style="list-style-type: none"> • Click Ignore to keep this instance of the word as is. • Click Ignore All to keep all instances of the word. • Click Add to add the word to the dictionary (the spell checker always accepts the word as correct from this point on). • Delete the word in the text box, and type a correction. • Highlight a suggested word in the Suggestions list, and then click Replace to replace this instance of the word or click Replace All to replace all instances of the word.
3	The spell checker continues to display words to check. Take actions as described in step 2 for each word displayed in the Not in Dictionary box.
4	<p>A message opens to tell you when spell checking is complete. Click OK to close the message and the dialog.</p> <p>Or</p> <p>Click Cancel or the X in the upper right corner to close the Spell Check dialog.</p>

Notes on spell checking

- Customize the spell checker by:
 - Specifying types of words to skip (for example, words in uppercase)
 - Changing settings for fields to check and subfields within the fields to skip, or importing the settings you used with Passport or CatME
 - Setting an option to skip name information in field 505
 - Adding, editing, or deleting words from the spell checker dictionary or importing the content of the user dictionary you used with Passport or CatMESee Basics/Set Options and Customize, “Customize the spell checker.”
- The spell checker skips (accepts as correct) diacritics and special characters in the ALA character set that the client supports.
- The spell checker skips (accepts as correct) non-Latin script data.

5 Default keystroke shortcuts for navigating and editing records

If you prefer, use the keyboard rather than the mouse for editing records.

The following table describes default keystroke shortcuts and gives equivalent menu commands and access keys for moving the cursor and working with fields and data in fields.

For more editing commands and keystroke shortcuts, see “Edit bibliographic records.”

Note on navigating and editing fixed field elements:

- Keystroke functions in the fixed field may work differently when the fixed field is displayed at the **Top** or **Bottom** of the record in **View > OCLC Fixed Field**.
- Arrow and tab keys may work differently, as noted in the table, when fixed field drop-down lists are displayed.
- The setting to show or hide fixed field lists is in **Tools > Options > Record Display**. By default, the drop-down lists display.

Press keystroke shortcut...	To do this...	Or click Menu > Command or press access keys (if available)
<Enter>	Insert a new field below the field where the cursor is located	Edit > Cut Copy Paste > Insert Blank Field > Below Current Field Or <Alt><E><C>
<Shift><Enter>	Insert a new field above the field where the cursor is located	Edit >Cut Copy Paste > Insert Blank Field > Above Current Field Or <Alt><E><C><A>
<Up arrow>	Move the cursor to the same position in the previous line In the fixed field with drop-down lists displayed: Move the cursor up within the current drop-down list only, without showing the entire list	None
<Down arrow>	Move the cursor to the same position in the next line In the fixed field with drop-down lists displayed: Move the cursor down within the current drop-down list only, without showing the entire list	None
<Shift><Up arrow>	In the fixed field: Moves cursor up to the fixed field element immediately above	None
<Shift><Down arrow>	In the fixed field: Moves cursor down to the fixed field element immediately below	None

Authorities: Edit Authority Records

Press keystroke shortcut...	To do this...	Or click Menu > Command or press access keys (if available)
<Alt><Up arrow>	Move the current field up one position In the fixed field with drop-down lists displayed: Displays the current drop-down list so that you can use arrow keys to scroll the list	Edit > Cut Copy Paste > Move Field > Up Or <Alt><E><C><M><D>
<Alt><Down arrow>	Move the current field down one position In the fixed field with drop-down lists displayed: Displays the current drop-down list so that you can use arrow keys to scroll the list	Edit > Cut Copy Paste > Move Field > Down Or <Alt><E><C><M><D>
<Ctrl><Up arrow>	Move the scroll bar up one line	None
<Ctrl><Down arrow>	Move the scroll bar down one line	None
<Right arrow>	Move the cursor to the right one character	None
<Left arrow>	Move the cursor to the left one character	None
<Ctrl><Right arrow>	Move the cursor to the first character of the next word; in the fixed field, move the cursor to the right by one cell	None
<Ctrl><Left arrow>	Move the cursor to the first character of the previous word; in the fixed field, move the cursor to the left by one cell	None
<Shift><Arrows>	In variable fields: Select characters (right/left arrows) or lines (up/down arrows) one at a time. The selections span cells and fields	None
<Tab>	Move the cursor to the next cell In the fixed field with drop-down lists displayed or not displayed: Moves the cursor forward to element name, cell, element name, cell, etc.	None
<Shift><Tab>	Move the cursor to the previous cell In the fixed field with drop-down lists displayed: Moves the cursor backward from cell to cell to cell	None
<Page Up>	Move the cursor and scroll the window up to display the previous part of the window	None
<Page Down>	Move the cursor and scroll the window down to display the next part of the window	None
<Delete>	Delete single character if no text is highlighted. Delete highlighted text if text is selected	None
<Alt><Delete>	Delete the entire variable field where the cursor is located	Edit > Cut Copy Paste > Delete Field Or Use the right-click menu command Or <Alt><E><C><L>

Authorities: Edit Authority Records

Press keystroke shortcut...	To do this...	Or click Menu > Command or press access keys (if available)
<Backspace>	Delete a single character to the left of the cursor if no text is highlighted, or delete highlighted text	None
<Home>	Move the cursor to the beginning of the cell	None
<Ctrl><Home>	Move the cursor to the beginning of the record	None
<End>	Move the cursor to the end of a cell	None
<Ctrl><End>	Move the cursor to the end of the record	None
<Ctrl><X> Or <Shift><Delete>	Cut selected text and copy to the clipboard	Edit > Cut Copy Paste > Cut Or Use the right-click menu command Or <Alt><E><C><T>
<Ctrl><C> or <Ctrl><Insert>	Copy selected text to the clipboard	Edit > Cut Copy Paste > Copy Or Use the right-click menu command Or <Alt><E><C><C>
[None]	Copy selected text to the Windows clipboard in plain text (ASCII) format	Edit > Cut Copy Paste > Copy as Text Or <Alt><E><C><O>
<Ctrl><V> Or <Shift><Insert>	Paste from the clipboard at the cursor location	Edit > Cut Copy Paste > Paste Or Use the right-click menu command Or <Alt><E><C><P>
[None]	Paste all of the data copied from a Web page into a single field (automatically removes paragraph and line breaks which cause the copied data to be pasted into separate fields)	Edit > Cut Copy Paste > Paste Unformatted Or Use the right-click menu command Or <Alt><E><C><S>
<Alt><Insert>	Copy the field where the cursor is located	Edit > Cut Copy Paste > Copy Field Or Use the right-click menu command Or <Alt><E><C><I>
<Ctrl><T>	Copy the OCLC control number	Edit > Cut Copy Paste > Copy Control Number Or Use the right-click menu command Or <Alt><E><C><Y>
<Ctrl><Z>	Undo edits one at a time in the cell where the cursor is located Note: Applies only to the current cell, not to entire record	Edit > Cut Copy Paste > Undo Or Use the right-click menu command Or <Alt><E><C><U>

Authorities: Edit Authority Records

Press keystroke shortcut...	To do this...	Or click Menu > Command or press access keys (if available)
<Ctrl><Shift><Z>	Cancel all edits since the last time you saved the record	Edit > Cut Copy Paste > Cancel Changes Or <Alt><E><C><C>
<F6>	Move the cursor to the next record area. The client has three record areas: <ul style="list-style-type: none"> • Record identification area • Fixed field • Variable fields 	Edit > Next Record Area Or <Alt><E><X>
<Shift><F6>	Move the cursor to the previous record area	Edit > Previous Record Area Or <Alt><E><V>
<Ctrl><F7>	Delete the text from the cursor to the end of the current cell	None
<Alt><F7>	Delete the word where the cursor is located	None
<Ctrl><S>	Move the cursor to the next subfield or to the beginning of the next field	None
<Shift><Ctrl><S>	Move the cursor to the previous subfield or to the end of the previous field	None

6 Insert diacritics and special characters

- Character set and font**
- **The Connexion client default font is Ariel Unicode MS**, a Unicode-compliant font, if this font is installed on your workstation. Ariel Unicode MS is likely to be installed, since it is included with many Microsoft applications such as Microsoft Office 2000, Office XP, etc.
 - If you do not use Ariel Unicode MS in the client, select another Unicode-compliant font for best results when viewing and inserting diacritics and special characters in records, lists, and labels.
 - WorldCat and the LC authority file support the standard character set adopted by the American Library Association (ALA). It is a character set widely used by libraries cataloging materials in Latin-based/influenced languages.

The ALA character set allows the representation of diacritics and characters (primarily the roman alphabet and some special characters) commonly used in Latin-based/influenced languages.

- **For printing labels**, OCLC recommends selecting the **ALA BT Courier** font as the default (**Tools > Options > Fonts**). The font is supplied when you install the client. It includes the ALA character set for displaying and printing diacritics and special characters.
- View font selections or select a font in **Tools > Options > Fonts tab**.
- Insert diacritics and special characters in:
 - Records
 - Searches (WorldCat search or browse, LC authority file search or browse, online bibliographic save file search, constant data search)
 - Labels
 - Text you want to find and replace


Insert diacritics and characters in records using the client graphical chart or list of names

Use the Enter Diacritics and Special Characters window (see the following procedure) or default keystroke shortcuts in the client to insert characters. Do not use other methods such as copying and pasting from outside the client. The client may appear to display a character you paste from another application, but the record will fail validation.

Follow these guidelines when entering diacritics and special characters:

- **Diacritic follows letter.** Always insert diacritics and characters **after** the character it modifies.
- Use these standard Unicode practices to enter ligatures, paired diacritics, and multiple diacritics.
 - Enter diacritics from letter outward. Letter-DiacriticNearer-DiacriticFarther.
 - Enter letter with diacritics above and below in this order: Letter-DiacriticBelow-DiacriticAbove.

Enter a diacritical mark or a special character by selecting its graphical image or its name:

	Action
1	Place the cursor in a displayed record where you want to insert a character or diacritic.
2	On the Edit menu, click Enter Diacritics , or click  , or press <Ctrl><E>.
3	<p>In the Enter Diacritics and Special Characters window, in the graphical chart, click the character or diacritic you want to insert. The corresponding name of the diacritic or character displays in the Character list.</p> <p>Or</p> <p>In the Character list, click the name of the diacritic or character you want to insert. The corresponding diacritic or character is highlighted in the chart.</p> <p>Or</p> <p>Optional: To see diacritics and characters used for a specific language, click the name of the language in the Language list. The diacritics and characters for the selected language are highlighted in the chart.</p>
4	<p>Click Insert to insert the selected diacritic or character if you want to leave the window open to insert another.</p> <p>Or</p> <p>Click Insert and Close to insert the diacritic or character and close the window.</p> <p>Or</p> <p>Click Close to close the window without inserting a diacritic or character.</p>

Alternative: Insert diacritics and characters in records using keystroke shortcuts

The client provides default keystroke shortcuts for inserting diacritics and special characters. To enter a diacritic or character in a record using a keystroke shortcut:

Action
<p>Place the cursor in a displayed record where you want to insert a diacritic or character and press the keystroke shortcut.</p> <p>Example: Press <Ctrl><Alt> (default keystroke) to enter the acute character.</p>

See “Default keystroke shortcuts for diacritics and special characters” for a complete list of shortcuts supplied by the client. Or for a procedure to assign your own shortcuts for inserting characters, see “Customize keystroke shortcuts for menu items, macros, or characters.”

Insert diacritics and characters in searches, labels, or find/replace text

Use the same methods—**Enter Diacritics** command on the Edit menu or the **Enter Diacritics** button in a window, or a keystroke assigned to the diacritic or character—for entering searches (or a browse), in labels, or in text you want to find and replace:

Action
Press the keystroke shortcut for the character you want to insert. Or In any search window, in the Label window, or in the Find/Replace window, click Enter Diacritics . In the Enter Diacritics and Special Characters window, select a character from the graphical chart or list of names (follow steps 3 and 4 in the table above).

RLIN21 Latin keyboard alternative - bibliographic records only

For RLIN21 catalogers making the transition to Connexion client, OCLC makes available the same Latin keyboard for entering diacritics and special characters in the Connexion client that was used with RLIN21 software.

For more information and instructions, see:

- Download and installation instructions for the keyboards in Getting Started with OCLC Connexion Client at:

http://www.oclc.org/support/documentation/connexion/client/gettingstarted/gettingstarted/#client_install_RLIN21_keyboards.fm
- *RLIN21 Keyboards*, a PDF showing graphics of all RLIN21 keyboards (keyboards are also available for entering Arabic, Cyrillic, and Hebrew scripts) at:

<http://www.oclc.org/support/documentation/connexion/client/gettingstarted/gettingstarted/rlin21keyboards.pdf>
- *RLIN21 Latin Character Keystroke Alternatives*, a list of keystroke shortcuts for entering diacritics and special characters that are included in the RLIN21 Latin keyboard at:

<http://www.oclc.org/support/documentation/connexion/client/gettingstarted/gettingstarted/rlin21latincharacterkeystrokes.pdf>

Note: See the last section of “Default keystroke shortcuts for entering diacritics and special characters” in this booklet for information on conflicts between keystroke shortcuts for the RLIN21 keyboard and default keystrokes in the client that include <Alt>, <Ctrl><Alt>, and <Ctrl><Alt><Shift>.

7 Default keystroke shortcuts for diacritics and special characters

About diacritics and special characters

- WorldCat and the online Library of Congress names and subjects authority file fully support entering diacritics and special characters from a character set adopted by the American Library Association (ALA) in records, for example, for items in Spanish, French, and other languages.
- The ALA character set is widely used by libraries in English-speaking countries.
- The character set allows the representation of characters, primarily the Roman alphabet and some special characters, and diacritics commonly used in Latin-based/influenced languages.
- You can insert diacritics and special characters using keystrokes; or when you display a record via **Edit > Enter Diacritics**; or when you type a search, display a label, or find/replace text via an **Enter Diacritics** button in the associated dialogs.
- Enter a diacritic or special character **after** the letter it modifies.
- For ligatures, paired diacritics, and multiple diacritics:
 - Enter diacritics from letter outward. Letter-DiacriticNearer-DiacriticFarther.
 - Enter letter with diacritics above and below in this order: Letter-DiacriticBelow-DiacriticAbove.
- You can customize keystrokes for entering diacritics and special characters. You can change keystrokes for a character you use often, or assign it to a User Tool.

Keystroke shortcuts

The following table shows default keystrokes for entering diacritics and special characters:

Character	Default Keystroke Shortcut
Acute	<Ctrl><Alt>
ae, lowercase	<Ctrl><Alt><5>
AE, uppercase	<Ctrl><Alt><Shift><5>
Alif	<Ctrl><Alt><. > (period/decimal point)
Ayn	<Ctrl><Alt><0> (zero)
Breve	<Ctrl><Alt><F>
British Pound	<Ctrl><Alt><9>
Candrabindu	<Ctrl><Alt><O> (letter o)
Cedilla	<Ctrl><Alt><P>
Circle above letter	<Ctrl><Alt><J>
Circle below letter	<Ctrl><Alt><T>
Circumflex, non-spacing	<Shift><6>
d with crossbar, lowercase	<Ctrl><Alt><3>
D with crossbar, uppercase	<Ctrl><Alt><Shift><3>
Delimiter	(See “subfield delimiter”)

Character	Default Keystroke Shortcut
Dot below letter	<Ctrl><Alt><R>
Dot in center of line	<Ctrl><Alt><Shift><9>
Double acute	<Ctrl><Alt><N>
Double dot below letter	<Ctrl><Alt><S>
Double tilde (left half)	<Ctrl><Alt><Z>
Double tilde (right half)	<Ctrl><Alt><[> (open bracket)
Double underscore	<Ctrl><Alt><U>
Eth, lowercase	<Ctrl><Alt><Shift><;> (semicolon)
Eth, uppercase	<Ctrl><Alt><Shift><3> (same as D with crossbar, uppercase)
Grave, non-spacing	<`>
Hacek	<Ctrl><Alt><I>
High comma, centered	<Ctrl><Alt><Shift><6>
High comma, off-center	<Ctrl><Alt><M>
Inverted cedilla	<Ctrl><Alt><X>
I with slash, lowercase	<Ctrl><Alt><1> (one)
L with slash, uppercase	<Ctrl><Alt><Shift><1> (one)
Left hook	<Ctrl><Alt><W>
Ligature (left half)	<Ctrl><Alt><K>
Ligature (right half)	<Ctrl><Alt><L>
Macron	<Ctrl><Alt><E>
Miagkii znak	<Ctrl><Alt><"> (quotation marks)
Musical flat	<Ctrl><Alt><0> (zero)
o with hook, lowercase	<Ctrl><Alt><,> (comma)
O with hook, uppercase	<Ctrl><Alt><Shift><,> (comma)
o with slash, lowercase	<Ctrl><Alt><2>
O with slash, uppercase	<Ctrl><Alt><Shift><"> (quotation marks)
oe, lowercase	<Ctrl><Alt><6>
OE, uppercase	<Ctrl><Alt><Shift><7>
Plus/minus	<Ctrl><Alt><Shift><+> (plus sign)
Pseudo question mark	<Ctrl><Alt><Shift><2>
Right hook	<Ctrl><Alt><Q>
Script I	<Ctrl><Alt><Shift><.> (period/decimal point)
Subfield delimiter	<Ctrl><D>
Subscript 0	<Alt><0> (zero)
Subscript 1	<Alt><1>

Character	Default Keystroke Shortcut
Subscript 2	<Alt><2>
Subscript 3	<Alt><3>
Subscript 4	<Alt><4>
Subscript 5	<Alt><5>
Subscript 6	<Alt><6>
Subscript 7	<Alt><7>
Subscript 8	<Alt><8>
Subscript 9	<Alt><9>
Subscript left parenthesis	<Alt><[> (open bracket)
Subscript minus	<Alt><-> (minus sign)
Subscript plus	<Alt><+> (plus sign)
Subscript right parenthesis	<Alt><]> (close bracket)
Superior dot	<Ctrl><Alt><G>
Superscript 0	<Alt><Shift><0> (zero)
Superscript 1	<Alt><Shift><1>
Superscript 2	<Alt><Shift><2>
Superscript 3	<Alt><Shift><3>
Superscript 4	<Alt><Shift><4>
Superscript 5	<Alt><Shift><5>
Superscript 6	<Alt><Shift><6>
Superscript 7	<Alt><Shift><7>
Superscript 8	<Alt><Shift><8>
Superscript 9	<Alt><Shift><9>
Superscript left parenthesis	<Alt><Shift><[> (open bracket)
Superscript minus	<Alt><Shift><-> (minus sign)
Superscript plus	<Alt><Shift><+> (plus sign)
Superscript right parenthesis	<Alt><Shift><]> (close bracket)
Thorn, lowercase	<Ctrl><Alt><4>
Thorn, uppercase	<Ctrl><Alt><Shift><4>
Tilde, non-spacing	Use the Enter Diacritics and Special Characters dialog to enter, or custom-map a keystroke to enter
Tilde, spacing (use in URLs)	<~> (tilde)
Turkish i without dot, lowercase	<Ctrl><Alt><8>
Tverdyi znak	<Ctrl><Alt><7>
u with hook, lowercase	<Ctrl><Alt><-> (minus sign)

Character	Default Keystroke Shortcut
u with hook, uppercase	<Ctrl><Alt><+> (plus sign)
Umlaut	<Ctrl><Alt><H>
Underscore, non-spacing	<_> (underscore)
Underscore, spacing (use in URLs)	Use the Enter Diacritics and Special Characters dialog to enter, or custom-map a keystroke to enter
Upadhmaniya	<Ctrl><Alt><Y>

Keystroke shortcuts for RLIN21 Latin keyboard - bibliographic records only

For those who choose to use the RLIN21 Latin keyboard for entering diacritics and special characters instead of the client’s built-in **Edit > Enter Diacritics** function, see a list of keystroke shortcuts for entering diacritics and special characters that are included in the RLIN21 Latin keyboard in *RLIN21 Latin Character Keystroke Alternatives* at:

<http://www.oclc.org/support/documentation/connexion/client/gettingstarted/gettingstarted/rlin21latincharacterkeystrokes.pdf>

Caution:

- While using the RLIN21 keyboards (also available: Arabic, Cyrillic, and Latin keyboards), you cannot use Connexion client default keystrokes mapped to alpha-numeric characters that include the **Alt**, **Ctrl+Alt**, or **Ctrl+Alt+Shift** keys.
- These combinations are used with the RLIN21 keyboards and override the Connexion client keystrokes when you use an RLIN21 keyboard.
- However, Connexion client function keys and keystrokes assigned to alpha/numeric characters that include the **Ctrl**, **Alt+Shift** and **Ctrl+Shift** keys are available.

• **Examples:**

The default keystroke for **Action > Delete Record**, mapped to <Ctrl><Alt><D>, conflicts with the RLIN21 keyboards and cannot be used; you must re-map the **Delete Record** action to another keyboard shortcut if you want to use it while also using the RLIN21 keyboards.

- However, you can continue to use the default keystroke for entering the delimiter character (<Ctrl><D>) and the default keystroke for **Action > Export** (<F5>), since they do not conflict with RLIN21 keyboards.

8 Authorization levels and cataloging capabilities

Cataloging capabilities

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

OCLC assigns each library one or more authorization numbers to log on to Connexion. The authorization is associated with the cataloging level established by your OCLC profile. The authorization tells Connexion when you log on what actions you are authorized to take.

Authorization levels and what you can do

The following table lists authorization levels in order of most basic to highly specialized, with a list of actions authorized for each level. Unless specified, actions are available for both bibliographic and authority records if applicable to both.

Authorization level	Connexion client authorized actions	Connexion browser authorized actions
Search	<ul style="list-style-type: none"> • Search any OCLC database and display retrieved records, including WorldCat, LC names and subjects authority file, LC names and subjects history file, and the Chinese name authority file • Export records • Display holdings • Display institution records • Report errors in records • Create labels • Print • Edit records locally • Save records to local save file • Search online save file • Create records • Use constant data • Import records 	<ul style="list-style-type: none"> • Search any OCLC database and display retrieved records, including WorldCat, LC names and subjects authority file, and the LC names and subjects history file • Export records • Display holdings • Display institution records • Report errors in records • Create labels • Print • Display local holdings
	<p>Notes:</p> <ul style="list-style-type: none"> • Chinese name authority records (available in the client only) and authority history records are read-only. You can copy and paste from the records or print them. You cannot edit or export them. • In some circumstances (for example, you use a Search authorization for Resource Sharing activities), your Search authorization may include additional local holdings capabilities. 	

Authorities: Edit Authority Records

Authorization level	Connexion client authorized actions	Connexion browser authorized actions
Limited	<p>Same actions as for Search plus the following actions:</p> <ul style="list-style-type: none"> • Submit records for review • Lock records • Save records to online save file • Delete records from online save file • Validate records • Control headings <p>Note on maintaining local holdings: Although local holdings maintenance is available only in the browser, you can open the browser local holdings interface and automatically log on from within the client: Click Tools > Launch Local Holdings Maintenance.</p>	<p>Same actions as for Search plus the following actions:</p> <ul style="list-style-type: none"> • Edit records locally • Create records • Use constant data • Import records • Submit records for review • Lock records • Save records to online save file • Search online save file • Delete records from online save file • Validate records • Control headings • Create and add, edit and replace, or delete local holdings
	<p>Note on the online save file: Each library has a single online save file associated with its authorization, which you can access using either the client or the browser interface.</p>	
Full	<p>Same actions as for Search plus Limited and the following actions:</p> <ul style="list-style-type: none"> • Set and delete holdings on bibliographic records • Replace master bibliographic records in WorldCat <p>Note: For specific ways you can upgrade master records based on your authorization level, go to http://www.oclc.org/support/documentation/connexion/client/cataloging/bibactions/#cat_act_upgrades.</p> <ul style="list-style-type: none"> • Add new bibliographic records to WorldCat • Create and add, edit and replace, or delete your library's bibliographic institution records (IRs) (if your logon authorization includes IRs) 	
NACO (Name Authority Cooperative program)	<p>Same actions as for Full plus the following actions:</p> <ul style="list-style-type: none"> • Replace name authority records in the LC authority file • Add new name authority records to the LC authority file 	
Agent	<p>Same actions as for Full plus the following actions:</p> <ul style="list-style-type: none"> • Set and delete holdings on bibliographic records on behalf of other libraries for whom the agent is providing cataloging • Maintain local holdings on behalf of other libraries 	
Regular Enhance	<p>Same actions as for Full</p> <p>Used by Enhance participants to enhance non-national, non-PCC (Program for Cooperative Cataloging) master bibliographic records in authorized formats, except records for serials</p>	
Enhance National	<p>Same actions as for NACO</p> <p>Used by Enhance participants to enhance national and PCC master bibliographic records in authorized formats, except records for serials</p>	

Authorities: Edit Authority Records

Authorization level	Connexion client authorized actions	Connexion browser authorized actions
Regular CONSER (Cooperative Online Serials program)	Same actions as for Full Used by CONSER participants to authenticate and maintain master continuing resource records	
CONSER National	Same actions as for NACO Used by CONSER participants to authenticate and maintain master continuing resource records	
Notes: <ul style="list-style-type: none"> • See more about the Program for Cooperative Cataloging (PCC), including NACO and CONSER, on the Library of Congress Web site at http://www.loc.gov/catdir/pcc/. • This table does not cover the CatExpress Web-only interface for copy cataloging. CatExpress authorizations do not have different levels. For more CatExpress information, see the CatExpress User Guide at: http://www.oclc.org/support/documentation/catexpress/using/guide/1introduction/chap1.htm#cx-overview. 		

Definitions of master record upgrades versus records with local edits

Edit mode	Definition and notes
Master bibliographic or name authority record (locked or unlocked)	<ul style="list-style-type: none"> • A master record is the version of the record available to all who have access to Connexion. It does not include local data for any library. • To replace a master record, it must be locked in WorldCat or the LC authority file: <ul style="list-style-type: none"> — Connexion client: With a WorldCat or save file record open, click Action > Lock Master Record. Edit the record and replace it (Action > Replace Record). Or Edit the record locally (while it is unlocked), and when you replace it, let the system lock the record automatically before completing Replace. Note: If another user has already locked or replaced the record after you opened or saved it, your replace action fails and you get an error message — Connexion browser: With a save file record open, click the Action list and then click Lock Master Record. Edit the record and replace it (in the Action list, click Replace Record). • When you lock a record (or the client locks it before replacing it), no other user can access the master record until you unlock it or the Replace is completed. • Other users can retrieve the record or edit it locally while the master record is locked.
Locally edited bibliographic or authority record	<ul style="list-style-type: none"> • A locally edited record is a copy of the master record that you can modify for your particular library needs, and then export to your local system, without affecting the master record. • Any time you edit a record without locking it or replacing it, you are making local edits. Other users can retrieve the record, edit it locally, or lock and edit the master record. • You are using local editing when you do copy cataloging.

Authorities: Edit Authority Records

Summary: The following table summarizes editing and actions on master versus locally edited records, depending on authorization level:

Authorization levels and making master record edits versus local edits

Record level/ authorization level	Connexion client: Editing/actions authorized	Connexion browser: Editing/actions authorized	Records/modifications authorized
Locally edited records Search and higher	Edit records locally; save to local save file; export	Display record; export	Any record in WorldCat or the LC authority file. Client: Any modifications for local use.
Locally edited records Limited and higher	Lock, edit, and save record to local or online save file; export	Lock, edit, and save record to online save file; export	Any record in WorldCat or the LC authority file. Any modifications for local use.
Master records Full, NACO, or higher	Lock (optional), edit, and save (optional) record; replace; export	Lock, edit, and save record; replace; export	<ul style="list-style-type: none"> Records your library contributed. Minimal-level records you are upgrading. Records you are enriching (adding call numbers, contents notes, subject headings, non-Latin script data, etc.). For details see “Upgrades to master bibliographic records and required authorizations” at http://www.oclc.org/support/documentation/connexion/client/cataloging/bibactions/#cat_act_upgrades .