

# OCLC Connexion Client: Connexion Digital Import

## Introduction

### Summary procedure

To attach digital files to WorldCat records and upload in CONTENTdm:

1. Retrieve a WorldCat record (or create one and add it to WorldCat using **Action > Holdings > Update Holdings**).
2. Use **Edit > Attach Digital Content**, select a CONTENTdm collection, and specify files to attach.
3. Use **Action > Replace Record** to:
  - o Replace the master WorldCat record.
  - o Send the digital content to a CONTENTdm collection.
  - o Automatically link the files in the record by adding a field 856 containing the URL for the digital file(s) as a hot link

### Requirements

- License for using CONTENTdm
- Use of the CONTENTdm hosting service
- At least one established CONTENTdm collection
- OCLC system logon authorization that includes:
  - o CONTENTdm access
  - o Cataloging level of **Full** or higher

### Limitations on file size and upload time



- Total size limit of one or more new file(s) to be uploaded to CONTENTdm for a single Replace action: Cannot exceed the memory (RAM) of your workstation. If total file size is larger than RAM, the files are not uploaded, the Replace Record action fails, and you receive an error message.
- Upload time limit for attached file(s) when you replace a record to which the files are attached: 39 minutes (or an inactivity timeout you set for automatic logoff in **Tools > Options > General**; click **Session Timer Options**). Note: Files are uploaded even if automatic logoff makes the Replace action fail.

## Attach digital files to WorldCat records

### Before you begin

- **Attach files only to existing WorldCat records.** If you create a record to which you will attach files, OCLC recommends that you use Encoding Level 3.
- If you attach files from your hard drive, you must use the same workstation when you replace the record and upload the files.
- If you attach files from a network drive, you must be able to access them from the workstation you use to replace the record and upload the files.
- Contact your CONTENTdm administrator to set up a new collection for storing files you want to attach, if needed.

### Attach digital files to records interactively

	Action
1	Log on to the OCLC system. Retrieve an existing WorldCat record from WorldCat itself or from your online or local save file. Or Create a record, add it to WorldCat, and then retrieve it.
2	<b>Optional.</b> Click <b>Action &gt; Lock Master Record</b> (<Alt><F8>).
3	Click <b>Edit &gt; Attach Digital Content</b> (<Alt><E><A>).
4	In the Attach Digital Content window, select a collection from the list of your existing CONTENTdm collection(s).
5	In the Attach Digital Content window, click <b>Browse</b> .
6	In the Open window, enter the path and file name of the file you want to attach, or navigate to the folder and click to select a file. Then click <b>Open</b> .  Repeat this step to add more files if needed.
7	<b>Optional:</b> <ul style="list-style-type: none"> <li>• Change the order of files: Click <b>Move Up</b> or <b>Move Down</b>. (This is the order in which patrons will see the files.)</li> <li>• Remove files: Select a file and click <b>Remove</b>, or click <b>Remove All</b>.</li> <li>• View files: Click <b>Details</b> to see file names, folders and sizes. Click <b>Thumbnails</b> to see larger icons of files.</li> <li>• Check the running total size of all files listed: Below the list of files, the client displays a running total size (in kilobytes) of all files to be attached.</li> <li>• Cancel attaching files: Click <b>Cancel</b> at any time to close the Attach Digital Content window without attaching them.</li> </ul>
8	When ready, click <b>OK</b> to attach files.  <b>Results:</b>    <ul style="list-style-type: none"> <li>• The Attached Files icon (  ) appears in the upper left corner of the record.</li> <li>• <b>Caution:</b> File(s) are not uploaded into your CONTENTdm collection, nor is the URL for the file(s) added to the master record until you Replace the record (step 9).</li> <li>• If multiple files are attached to a record (compound object), the systems assume that the files are parts of a single object, such as the front and back of a postcard</li> </ul>
9	Click <b>Action &gt; Replace Record</b> [or <b>Replace and Update Holdings</b> ]. See "Results" below.

### Attach digital files to records via batch processing

	Action
1	Without logging on, retrieve an existing WorldCat record from the local save file.
2	Follow steps 3 through 9 in the procedure above. Step 9 marks the record for the batch Replace action.

	Action
3	Repeat to mark more records for the batch Replace action.
4	Click <b>Batch &gt; Process Batch</b> (<Alt><B><P>).
5	In the Process Batch window, select the check box next to the local file containing the records you marked for Replace.
6	Under <b>Process</b> , click the <b>Online Record Actions</b> checkbox.
7	Click <b>OK</b> . By default, a batch report opens as soon as processing is completed, showing results of the batch.

### Results of attaching files and replacing the master record

#### Logged on or offline:

- If you are logged on, the Replace action occurs immediately.
- If you are logged off (using your local file), the record is marked **R** (Ready for batch Replace) in the status bar of the record. The path to the files you attached is saved with the record. You must run batch processing to complete the Replace action.

#### When Replace is successful, in WorldCat:

- Connexion adds an 856 field to the replaced master record, containing the URL as a hot link to the location of the attached files in the CONTENTdm collection.
- To activate the URL in field 856 of the master record and make the item and metadata viewable in CONTENTdm, you must:



	Action
1	Log on to CONTENTdm Admin.
2	Approve and index the collection to which you added the files.

#### When Replace is successful, in CONTENTdm:

- The record is converted to Dublin Core Qualified.
- Metadata that identifies the owning library is created.
- The digital files and metadata are placed in your CONTENTdm collection. The following are the details:
  - The OCLC number of the master record is mapped to the OCLC number field created in CONTENTdm, not to a Dublin Core field.
  - TIFF files are converted to JPEG2000 access derivatives if full resolution is enabled in the destination collection.
  - If the destination collection has a full text search field defined and the files are part of a compound object, TIFF files are processed by Optical Character Recognition (OCR) to generate searchable text.
  - If the destination collection has a full text search field defined, PDF files are processed with full text indexing, and multiple-page PDF files are converted to compound objects if PDF conversion is enabled in the collection.

#### When Replace Record fails:

- Even if Replace fails validation (either interactively or by batch):
  - The files are uploaded to the CONTENTdm collection.

- The Attached Files icon changes to  to indicate that the files were uploaded.
- The Replace status is *Failed*.
- If you replace the record again within fourteen days from the first attempt, you do not have to re-attach the files.
- If a Replace fails because of Bib Record Mismatch:
  - The system downloads the newer copy of the record.
  - The Attached Files icon changes to  to indicate that the files were uploaded. The Replace status is *Failed*. You must re-attach your files to the newer record.

### Results of saving records that have attached file(s) or sending the records for review

The results of saving records or sending records with attached files for peer review before the records are replaced or uploaded depends on where you save the records and how you send them for peer review. The following table summarizes the differences:

Action on record	Result
Save to online save file	Record is saved without the path(s) to the attached file(s)
Submit for peer review	Record is submitted (and saved to the online save file automatically) without the path(s) to the file(s).
Save to local file	Path(s) to the file(s) remain in the record.
Batch submit for peer review from local file	Record is submitted (and saved online) without the path(s) to the file(s).  Path(s) to the files remain in the local save file record.

### Display attached digital file(s) from a WorldCat record


Action
Retrieve the WorldCat record. In field 856, click the linked URL of the digital file..

## OCLC Customer Service

#### Connexion or CONTENTdm:

- Contact OCLC support: In Connexion client, click **Help > Contact Support** and then log on to the system to e-mail. Or call 1-800-848-5800 (USA) or 1-614-793-8682 (international). Or e-mail directly: [support@oclc.org](mailto:support@oclc.org).
- E-mail [contentdmsupport@oclc.org](mailto:contentdmsupport@oclc.org) or call 1-877-797-0887.

#### See also Connexion client Help:

- In the Connexion client, click **Help > Client Help**. Or press <F1>.
- Or click  on the toolbar.