

## Create Pathfinders and Add Content

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## Revision History

<b>Date</b>	<b>Section title</b>	<b>Description of changes</b>
February 2003	1. Create pathfinder; 7. Pathfinder actions summary; 8. Use pathfinder	Revised to document new constant data terminology and functions: Derive New Constant Data Record, Apply Default CD, Select Constant Data.
November 2003	8. Use pathfinder	Updated to document new capability to export multiple flagged pathfinders (up to 100) to a file.
August 2005	4. Link URLs to records; 7. Pathfinder actions summary	Minor updates to reflect interface changes resulting from removing removing references to the Resource Catalog, which is now fully integrated into WorldCat.

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# 1 Create pathfinder

## Create a pathfinder from a URL

	Action
1	On the Pathfinders tab, under Create Options, click <b>Pathfinder</b> . The Create Pathfinder screen appears.
2	<b>(Optional)</b> Specify the editing view. In the first line of text on the screen, open the list of templates. Then click <b>Outline</b> or <b>Linear</b> .
3	Click the option button labeled <b>Create a new pathfinder from this URL</b> . In the text box, type the URL for the page you want to use as a starting point for a pathfinder. You can omit <b>http://</b> .
4	To exclude navigational links on the page, make sure that the <b>Exclude Local Links</b> check box is selected (default setting). To include local links, click to clear the check box. <b>Note: Exclude local links.</b> By default, the extraction process ignores links that serve only for navigation within a Web site. In most cases, a link that lets users move between sections on a page, but does not point to a specific resource, is not useful for a pathfinder.
5	<b>(Optional)</b> Merge default pathfinder constant data. To merge content from your default pathfinder constant data with content extracted from the URL, select the check box labeled <b>Include Default Constant Data</b> . <b>Default setting:</b> check box selected; the system adds default constant data.
6	Click <b>Create</b> . The system locates the web page and extracts a title, description, and links from it. A pathfinder editing template appears, with extracted information inserted. If you chose to include it, content from your default pathfinder constant data appears in the new pathfinder.
7	Edit the extracted content to create a pathfinder that organizes and points to the resources you have selected.
8	Add the pathfinder to the database. On the Action list, click <b>Add Pathfinder</b> . Then click <b>OK</b> to confirm the action. When you add a new pathfinder, the system supplies a pathfinder number. Or Save the pathfinder for later completion. On the Action list, click <b>Save Pathfinder</b> . Select a workflow status for the saved pathfinder. Open the status list and click the status you want to assign to this pathfinder. Click <b>Yes</b> to add the pathfinder to the save file. The system saves the pathfinder and displays the save file number.

## Create Pathfinders and Add Content

### Create a pathfinder from a blank template

	Action
1	On the Pathfinders tab, under Create Options, click <b>Pathfinder</b> . The Create Pathfinder screen appears.
2	<b>(Optional)</b> Specify the editing view. In the first line of text on the screen, open the list of templates. Then click <b>Outline</b> or <b>Linear</b> .
3	Select the option button labeled <b>Create a new blank Pathfinder</b> . Leave the text box empty.
4	<b>(Optional) Add default pathfinder constant data.</b> To insert content from your default pathfinder constant data in the blank pathfinder, select the check box labeled <b>Include Default Constant Data</b> . <b>Default setting:</b> check box selected; the system adds default constant data.
5	Click <b>Create</b> .  <b>Results</b> A pathfinder editing template appears. The system automatically adds 5 empty elements to the template: one Search element (for creating an embedded search) and four Link elements. If you chose to include it, content from your default pathfinder constant data appears in the new pathfinder.
6	Enter title, description, headers, dynamic searches, and links to create a pathfinder that organizes and points to the resources you have selected.
7	Add the pathfinder to the database. On the Action list, click <b>Add Pathfinder</b> . Then click <b>OK</b> to confirm the action. When you add a new pathfinder, the system supplies a pathfinder number. Or Save the pathfinder for later completion. On the Action list, click <b>Save Pathfinder</b> . Select a workflow status for the saved pathfinder. Open the status list and click the status you want to assign to this pathfinder. Click <b>Yes</b> to add the pathfinder to the save file. The system saves the pathfinder and displays the save file number.

## Create Pathfinders and Add Content

### Create a pathfinder derived from a model pathfinder

	Action
1	Find a pathfinder to serve as a model. A model pathfinder includes links appropriate for the pathfinder you want to create and/or exemplifies an organizational approach you can adapt easily.
2	View the full pathfinder.
3	On the Edit list, click <b>Derive New Pathfinder</b> .
4	The system asks whether you want to preserve local content. Local content refers to pathfinder elements (Link or Library Material or Licensed Resource) for which the Local Record Only? option is set to Yes. Click <b>OK</b> to include local-content elements in the new (derived) pathfinder. Click <b>Cancel</b> to exclude local-content elements. <b>Results</b> The pathfinder content is redisplayed in an editing template. NEW appears in the Pathfinder: field. In the Derived Pathfinder History field (Rights options, Pathfinder Header), the system supplies the number of the model pathfinder you from which you derived the new pathfinder, your institution symbol, and the current date.
5	Edit the pathfinder to adapt it for your purposes.
6	Add default pathfinder constant data if desired. On the Edit list, click <b>Apply Default Pathfinder Constant Data</b> .
7	Add the pathfinder to the database. On the Action list, click <b>Add Pathfinder</b> . Then click <b>OK</b> to confirm the action. When you add a new pathfinder, the system supplies a pathfinder number. Or Save the pathfinder for later completion. On the Action list, click <b>Save Pathfinder</b> . Select a workflow status for the saved pathfinder. Open the status list and click the status you want to assign to this pathfinder. Click <b>Yes</b> to add the pathfinder to the save file. The system saves the pathfinder and displays the save file number.

### Constant data

To save keystrokes when creating or revising pathfinders, create **pathfinder constant data records**. In each constant data record, enter data you use frequently when creating or editing a particular category of pathfinder. For details on creating and using pathfinder constant data, search Help for the topic **pathfinder constant data**.

## 2 Use an embedded search for updated content

### Why add an embedded search?

- Construct a query that retrieves relevant items from the resource catalog and automatically adds them to a pathfinder.
- Provide dynamic content. Each time a user links to the pathfinder, the inserted Search element automatically retrieves new or updated information on pertinent resources.
- Select retrieved URLs to exclude from the pathfinder.

### Add Search element

	Action
1	Retrieve or create a pathfinder and open the pathfinder for editing. Move to the element above the position at which you want to add a Search element. <b>Linear view.</b> Scroll the Editing Pathfinder screen to locate the element. <b>Outline view.</b> In the outline area, click the hyperlinked title or URL of the element. You may need to expand sections to display titles for all links, subheaders, etc.
2	In the editing template, open the Functions list to the left of the element. Then click <b>Add</b> . <b>Linear view.</b> An empty Link element template appears below the current element. <b>Outline view.</b> A new entry appears in the outline area. (no title) appears as a placeholder for a title. An empty Link element template appears in the editing area.
3	Change the added element to <b>Search</b> . Click the arrow next to the field that shows the current element type (Link) to open the list of element types. Click <b>Search</b> .

### Use Query Builder (search form)

	Action
1	In the inserted Search element, click the Query Builder button. The Pathfinder Query Builder screen appears.
2	In the <b>Result Size</b> box, accept the default size (10 records) or specify the largest number of retrieved records you want added to the pathfinder. The range for Result Size is 1 to 999.

	<b>Action</b>
3	<p>Build a query to retrieve records appropriate for the pathfinder you are creating.</p> <ul style="list-style-type: none"> <li>• Type query term(s) in 1 or more boxes in the form. For each term, select the index to search from the list to the right of the box in which you enter the term. Open the list and then click the index you want to use.</li> <li>• To search for 2 or more terms in the <b>same</b> index, type the terms in 1 text box and select an index. Spaces between words are treated as <b>and</b> operators; you can also combine terms with <b>or</b> and/or exclude terms with <b>not</b>.</li> <li>• To search for 2 or more terms in <b>different</b> indexes, type each term in a separate text box and select the index to search for each term. Select the Boolean operator with which to combine the term(s). Use the list of operators at the left end of the box in which you enter the second term. Open the list and then click the operator you want to use.</li> <li>• Use truncation to expand a term to include variant endings. Or use truncation when you know only the first part of a term. Type the first characters of the term (include <b>at least 3 characters</b>); then type an <b>asterisk</b> (*). Examples: <b>librar*</b>, <b>comput*</b>, <b>catalog*</b></li> <li>• Use character masking (wildcards) to expand a term to include variant spellings or when you are unsure of the correct spelling for part of a term. Type a question mark (?) or a number sign (#) in place of the character(s) you want to mask. Use the question mark to retrieve variants of 0 or more characters. <b>Examples: col?r</b> retrieves <i>color</i> or <i>colour</i>; <b>int?net</b> retrieves <i>internet</i> or <i>intranet</i>. Use the number sign to retrieve variants of exactly 1 character. <b>Example: wom#n</b> retrieves both <i>woman</i> and <i>women</i>.</li> </ul>
4	<p><b>(Optional)</b> In the <b>Exclusions</b> box, specify URLs you do not want to appear as links added to the pathfinder. List the source URL for the pathfinder page and/or other superfluous URLs that might otherwise be retrieved by your query.</p>
5	<p><b>(Optional)</b> Click <b>Preview Query</b> to test the query before inserting it in the pathfinder. The system displays titles and descriptions for the specified number of results, excluding any URLs identified in the Exclusions box. The results appear in a frame at the bottom of the screen; the Query Builder remains available in the beginning frame.</p> <ul style="list-style-type: none"> <li>• Review the results. Then switch to the Pathfinder Query Builder frame. Change the query and/or exclusions. Repeat the Preview step as often as necessary to refine the query.</li> <li>• <b>Exclude URLs retrieved by the query preview.</b> Click the open box to the left of any item you want to exclude. A red <b>X</b> replaces the open box and the URL appears in the Exclusions box in the Query Builder frame.</li> </ul>
6	<p>Click <b>Create Query</b> to add the query to the pathfinder. You return to the pathfinder editing screen. The Search element shows the query you created. Or Click <b>Cancel Query</b> to leave the Query Builder screen without creating a query. You return to the pathfinder editing screen. The Search element with the Query Builder button remains in the pathfinder.</p>

	Action
7	<b>(Optional)</b> In the <b>Separator</b> area, click the option button for the type of separator you want following the links added via this search. The default setting is <b>None</b> .
8	<b>(Optional)</b> Insert a header before the Search element to organize the added links. Provide the header with a Title and/or a Description to indicate the content, scope, and/or purpose of the resources retrieved by the search.
9	Display the pathfinder with the links inserted by the query you constructed. Scroll to the beginning of the pathfinder. On the Edit list, click <b>Display Pathfinder</b> . The system displays the pathfinder. At the place where you added a Search element, the page includes links retrieved by the query. The number of added links can be up to the number you specified in Result Size.

**Use Free Text Query Builder (expert search)**

	Action
1	In the inserted Search element, click the <b>Free Text Query Builder</b> button. The Pathfinder Free Text Query Builder screen appears.
2	In the <b>Result Size</b> box, accept the default size (10 records) or specify the largest number of retrieved records you want added to the pathfinder. The range for Result Size is 1 to 999.
3	Build a query to retrieve records appropriate for the pathfinder you are creating. <ul style="list-style-type: none"> <li>Type query term(s) in the text box. For each term, specify the index to search. Precede each term with the correct index label; the list at the bottom of the screen gives the 2-letter label for each index.</li> <li>To search for 2 or more terms in separate indexes, use Boolean operator(s) <b>and</b>, <b>or</b>, and <b>not</b> to combine the term(s). Type spaces between operator(s) and term(s).</li> <li>Use truncation to expand a term to include variant endings. Or use truncation when you know only the first part of a term. Type the first characters of the term (include <b>at least 3 characters</b>); then type an <b>asterisk</b> (*). Examples: <b>librar*</b>, <b>comput*</b>, <b>catalog*</b></li> <li>Use character masking (wildcards) to expand a term to include variant spellings or when you are unsure of the correct spelling for part of a term. Type a question mark (?) or a number sign (#) in place of the character(s) you want to mask. Use the question mark to retrieve variants of 0 or more characters. <b>Examples:</b> <b>col?r</b> retrieves <i>color</i> or <i>colour</i>; <b>int?net</b> retrieves <i>internet</i> or <i>intranet</i>. Use the number sign to retrieve variants of exactly 1 character. <b>Example:</b> <b>wom#n</b> retrieves both <i>woman</i> and <i>women</i>.</li> </ul>
4	<b>(Optional)</b> In the <b>Exclusions</b> box, specify URLs you do not want to appear as links added to the pathfinder. List the source URL for the pathfinder page and/or other superfluous URLs that might otherwise be retrieved by your query.

	Action
5	<p><b>(Optional)</b> Click <b>Preview Query</b> to test the query before inserting it in the pathfinder.</p> <p>The system displays titles and descriptions for the specified number of results, excluding any URLs identified in the Exclusions box. The results appear in a frame at the bottom of the screen; the Free Text Query Builder remains available in the beginning frame.</p> <ul style="list-style-type: none"> <li>Review the results. Then switch to the Free Text Query Builder frame. Change the query and/or exclusions. Repeat the Preview step as often as necessary to refine the query.</li> <li><b>Exclude URLs retrieved by the query preview.</b> Click the open box to the left of any item you want to exclude. A red <b>X</b> replaces the open box and the URL appears in the Exclusions box in the Query Builder frame.</li> </ul>
6	<p>Click <b>Create Query</b> to add the query to the pathfinder.</p> <p>You return to the pathfinder editing screen. The Search element shows the query you created.</p> <p>Or</p> <p>Click <b>Cancel Query</b> to leave the Query Builder screen without creating a query.</p> <p>You return to the pathfinder editing screen. The Search element with the Free Text Query Builder button remains in the pathfinder.</p>
7	<p><b>(Optional)</b> In the <b>Separator</b> area, click the option button for the type of separator you want following the links added via this search. The default setting is <b>None</b>.</p>
8	<p><b>(Optional)</b> Insert a header before the Search element to organize the added links.</p> <p>Provide the header with a Title and/or a Description to indicate the content, scope, and/or purpose of the resources retrieved by the search.</p>

**Display pathfinder with search results**

	Action
1	After you create the query for the Search element, in the pathfinder editing template, scroll to the top of the screen.
2	<p>On the Edit list, click <b>Display Pathfinder</b>.</p> <p>The system displays the pathfinder. At the place where you added a Search element, the page includes links retrieved by the query. The number of added links can be up to the number you specified in Result Size.</p>

**Pathfinder settings and query results**

- **Resource Links.** By default, for each bibliographic record retrieved by the embedded search, the URL for the described resource appears in the pathfinder. If you set the Resource Links option (Pathfinder Header, Format Options) to **Record link only** or **Website link and record link**, the system adds links to each bibliographic record. Record links appear below (or in place of) URLs for described Web sites. Record links appear both in edit view and in the displayed pathfinder.
- **Excluded URLs.** If the query retrieves a record for which the URL appears in the Excluded URLs field of the Pathfinder Header (or the header under which you add the Search element), that record is **not** added to the pathfinder.

- **Descriptions.** By default, the content of the Description element in the bibliographic record appears in the pathfinder with the URL for the resource. If the **Links** item in the Description Options (Pathfinder Header or Header element, Format Options) is set to Hide or Hide All Levels, the descriptions are not displayed.

### Revise query in Search element

	Action
1	Retrieve the pathfinder in which you want to change a query. In the Editing Pathfinder screen, scroll to the Search element that contains the query you want to change.
2	In the Search element, Click the hyperlinked query. Or Click the Query Builder button or the Free Text Query Builder button. The system displays the Pathfinder Query Builder screen or the Pathfinder Free Text Query Builder screen. The existing query terms appear in the appropriate boxes on the screen.
3	Make desired changes to the query. Preview the revised query and select URLs to exclude from the results. Then click <b>Create Query</b> to insert the revised query in the pathfinder.

### 3 Add flagged bibliographic records to pathfinder

**Why?**

- Select specific items from the resource catalog to include in a pathfinder.
- Review the resources and/or records before including them in the pathfinder.
- Modify the title or description of an included resource to fit the context of the pathfinder.
- Gain the benefits of URL checking functionality. For pathfinder links that come from associated bibliographic records, the system accesses the records to obtain updated URLs before displaying the pathfinder and before exporting the pathfinder either as a link or as an HTML file. For a pathfinder exported as a dynamic link, the system updates URLs from associated records whenever a user follows the link on the library’s web site.

**Add Flagged Records**

	<b>Action</b>
1	Flag 1 or more bibliographic record(s) you want to add to the pathfinder you are editing. You can flag records when viewing a list of search results or when viewing a full record. You cannot flag records retrieved from WorldCat.
2	Retrieve or create a pathfinder and open the pathfinder for editing. Move to the element above the position at which you want to add flagged records. <b>Linear view.</b> Scroll the Editing Pathfinder screen to locate the element. <b>Outline view.</b> In the outline area, click the hyperlinked title or URL of the element. You may need to expand sections to display titles for all links, subheaders, etc.

	<b>Action</b>
3	<p>Select the element type <b>Flagged Records</b>.            Click the arrow to open the list of element types. The list box shows the current element type (Link or Header, etc.).            In the list of element types, click <b>Flagged Records</b>.            The system asks you whether you want the flags removed from the flagged record(s) after insertion in the current pathfinder.            Click <b>OK</b> to unflag the record(s) after insertion.            Click <b>Cancel</b> to retain the flags.  <b>Note:</b> Unflag the records unless you want to add them to another pathfinder or take other action on the group of records.</p> <p><b>Results</b>            Link elements representing the flagged records appear below the current element.  <b>Note: Resource Links.</b> By default, only the URL for the described resource appears in the pathfinder. If you set the Resource Links option (Pathfinder Header, Format Options) to <b>Record link only</b> or <b>Website link and record link</b>, the system adds links to each bibliographic record.            Record links appear below (or in place of) URLs for described Web sites.            Record links appear both in edit view and in the displayed pathfinder.  <b>Note: Excluded URLs.</b> If the URL of any flagged record appears in the Excluded URLs field of the Pathfinder Header (or the header under which you add the flagged records), that record is <b>not</b> added to the pathfinder.</p>
4	<p>Review inserted Link elements, delete any inappropriate links, and supply customized titles or descriptions if necessary.            See the next section for details</p>
5	<p><b>(Optional)</b> Insert a header to organize the added links.            Provide the header with a Title and/or a Description to indicate the content, scope, and/or purpose of the group of links.</p>

Complete Link elements for Flagged Records

	Action
1	<p>After adding Flagged Records, review the link elements added to the pathfinder.                      Display the pathfinder to check the title, description, and URL shown for each resource. By default, the system displays the title and description found in the bibliographic record and the first URL given in the bibliographic record.</p> <p><b>Override record contents?</b>                      To substitute a different title or description or specify which of several URLs to display, select <b>Yes</b> for the option labeled <b>Override record contents?</b>  <b>Default setting:</b> No.                      When the option is set to <b>No</b>, the system displays the title and description from the record.</p> <p>If you select <b>Yes</b>,</p> <ul style="list-style-type: none"> <li>• The system expands the Link element to insert text boxes for entering a customized title and description, and a box labeled Use URL # that lets you specify which URL (of several supplied in the bibliographic record) to show in the pathfinder.</li> <li>• If you enter text in the Title or Description box, the system displays your text instead of the title or description extracted from the bibliographic record. Otherwise, the extracted information appears in the displayed pathfinder.</li> <li>• For a bibliographic record that contains multiple URLs, if you specify a number for the URL, the system shows that URL in parentheses after the title. If you leave the option set to 1 (default), the system shows the first URL in the record.</li> <li>• Your revised title or description appears in place of the record's title or description in the displayed pathfinder. However, your changes do not affect the text of the bibliographic record.</li> <li>• <b>Note:</b> Your revised title or description appears in the displayed pathfinder. However, your changes <b>do not affect</b> the text of the bibliographic record.</li> </ul> <p><b>Embedded HTML?</b>                      If you choose to override record content and supply your own Description for a resource, you can control the appearance of the description (for example, by adding line breaks or inserting an image), or include links to related content within the description, by adding HTML encoding.                      To use this feature, enter HTML tags and other HTML code within the Description field and change the setting for the <b>Embedded HTML?</b> option to <b>Yes</b>. When the pathfinder is displayed or exported, the browser interprets the embedded HTML code to produce the effects you specify.                      To display the description as text only, leave the <b>Embedded HTML</b> option set to <b>No</b> (default setting).</p>
2	<p>In the <b>Local Record Only?</b> field, click to select the appropriate option button.</p> <ul style="list-style-type: none"> <li>• If the material is of interest to users outside your institution, click <b>No</b>.</li> <li>• If the material is useful only to users at your institution, click <b>Yes</b>.</li> <li>• The default setting is <b>No</b>.</li> <li>• Select <b>Yes</b> to allow users who derive new pathfinders from the pathfinder to exclude this link.</li> </ul>
3	<p>Make sure that all added link elements are appropriate for the pathfinder.                      Delete link elements if necessary.</p>

## 4 Link pathfinder URLs to bibliographic records

### Methods for linking a pathfinder to bibliographic records

- You have several methods for establishing links between URLs listed in a pathfinder and bibliographic records that describe the linked resources.
- Select the linking method that best fits your purpose for creating a pathfinder and your preferred workflow.
- You can also combine these methods as appropriate. For example, you can build the basic pathfinder using Link URLs to WorldCat Records or Flagged Records elements, and also include an embedded search to provide continuously updated content.
- The table summarizes the available linking methods.

Linking method	Why use this method?	How to / More information
Link URLs to WorldCat Records	Quick action available while editing a pathfinder. Links a pathfinder to appropriate existing records Reports pathfinder URLs that do not have corresponding records. Automatically creates preliminary records for URLs without corresponding bibliographic records.	See the following section, <b>Link URLs to records in WorldCat.</b>
Embedded search	Supplies relevant links from WorldCat. As new records on the pathfinder's topic are added to WorldCat, the embedded search retrieves them. When a user views the pathfinder, automatically searches WorldCat using a query you construct. Inserts URLs and descriptions from the retrieved records in the displayed pathfinder. Added content is for display only; you cannot edit the added links. Only the embedded search is available for editing.	See the following section, <b>Add an embedded search element</b>

Linking method	Why use this method?	How to / More information
Add Flagged Records	<p>Creates and adds a group of Link elements to a pathfinder using URLs and descriptions found in a set of records flagged in WorldCat. Added URLs and descriptions appear in displayed pathfinder. You can edit the content of inserted Link elements. Link elements become part of pathfinder until you delete them.</p>	<p>See the following section, <b>Add a Flagged Records element</b>.</p>
<p>Create multiple records from pathfinder (or model site)  <b>Link records to pathfinder using:</b>                      Link URLs to WorldCat Records                      Or                      Add Flagged Records</p>	<p><b>Automates record creation</b>                      Use the URL (or PURL) of a completed pathfinder as the base URL fed to the multi-record create function.  <b>Or</b> Use the URL of a web site that contains links you want to include in your pathfinder. For each URL in the pathfinder or web site, the system searches for the URL in WorldCat. If no record exists for the URL, the system creates a preliminary bibliographic record and adds the record to the save file with the status Extracted. You retrieve the records, complete them, and add them to WorldCat.  <b>Two ways to link records to pathfinder</b>                      Edit the pathfinder and take the Link URLs to WorldCat Records action.                      Or                      Flag the records in WorldCat. Then add a Flagged Records element to the pathfinder to insert Link elements that contain URLs and descriptions found in the flagged records.</p>	<p>See the following section, <b>Create and link multiple records for URLs in a pathfinder</b>.</p>

Linking method	Why use this method?	How to / More information
Create bibliographic record for pathfinder	Provides a bibliographic record that describes your pathfinder. Provides a record you can add to your local catalog. Informs other users about a resource you have created that may be of interest to their users.	See the following section, <b>Create a bibliographic record for the pathfinder.</b>

**Link URLs to records in WorldCat**

	Action
1	Retrieve a pathfinder from the pathfinder database or the pathfinder save file. Or Create a new pathfinder.
2	If not in edit mode, on the Edit list, click <b>Edit Pathfinder</b> . If the system prompts you to clone (derive a new pathfinder from) the pathfinder in order to modify it, click the <b>Clone</b> button. Or on the Edit list, click <b>Derive New Pathfinder</b> .
3	<p><b>(Optional)</b> Set options to control display of record links.</p> <ul style="list-style-type: none"> <li>In the Pathfinder Header, expand the Options group. Then expand the Format Options group.</li> <li>In the <b>Resource Links</b> field, specify whether to include links to records (as well as links to the described web sites) on the displayed pathfinder. The default setting is <b>Website link only</b>. If you select <b>Record link only</b> or <b>Website link and record link</b>, the system adds links to bibliographic records when you take the <b>Link URLs to WorldCat Records</b> action, when you add Flagged Records to the pathfinder, or when you include resources by embedding a Search element.</li> <li>Specify DC (Dublin Core) or MARC view for displaying the linked records.</li> </ul> <p><b>Effects of Resource Links options</b> Record links for records retrieved by an embedded Search appear when you <b>display</b> the pathfinder. Links for records added via Flagged Records or Link URLs to WorldCat Records appear both in edit view and in the displayed pathfinder. Record links appear below (or in place of) URLs for described web sites.</p>

	<b>Action</b>
4	<p>On the Edit list, click <b>Link URLs to WorldCat Records</b>.                      The system searches WorldCat and the save file for each URL in the pathfinder. If a record for a URL exists in WorldCat, the system links the record to the pathfinder.                      When finished, the system opens a new browser window to report the results.</p> <p><b>Record for URL in save file</b>                      The lists URLs for which records exist in your institution's save file. After you complete the records and add them to WorldCat, retrieve the pathfinder again and repeat the Link URLs to WorldCat Records action.</p> <p><b>No record found for URL</b>                      The system lists URLs for which no corresponding record exists in WorldCat or in your institution's save file.  <b>Select the URLs</b> for record creation:</p> <ul style="list-style-type: none"> <li>• Click the check box in front of a URL to select it.</li> <li>• To create records for all listed URLs, click <b>Flag All Resources</b>.</li> <li>• To clear all check boxes, click Reset.</li> </ul> <p><b>Create preliminary records</b> for the selected URLs:</p> <ul style="list-style-type: none"> <li>• Type your e-mail address in the box next to the Create button.</li> <li>• To have the system assign Dewey Decimal Classification numbers for the resource, select the check box labeled <b>Generate Dewey numbers</b> (requires WebDewey subscription).</li> <li>• Then click <b>Create</b>.</li> </ul> <p><b>Results:</b></p> <ul style="list-style-type: none"> <li>• The system creates a record for each URL and places the records in your save file with the status <b>URLinPathfinder</b>. Then the system sends you an e-mail message listing URLs for which records were created, with the save file number for each record. These new records remain in save file for 28 days and then are automatically deleted if not updated or added to WorldCat.</li> </ul> <p><b>Retrieve and complete</b> the preliminary records:</p> <ul style="list-style-type: none"> <li>• Use the save file record numbers to retrieve individual records for editing. Or use the Show By Status screen to retrieve a list of all saved records with the URLinPathfinder status.</li> <li>• Complete the records you want to use and add them to WorldCat.</li> </ul> <p><b>Link the new bibliographic records</b> to the pathfinder:</p> <ul style="list-style-type: none"> <li>• Retrieve the pathfinder and repeat the <b>Link URLs to WorldCat Records</b> action to link the records to the pathfinder.</li> </ul> <p><b>URLs linked to bibliographic records</b>                      The system lists URLs for which records exist in WorldCat. These URLs have been linked to the bibliographic records.</p> <ul style="list-style-type: none"> <li>• Click the <b>View</b> button in front of a URL to view the bibliographic record for the resource.</li> </ul> <p><b>Existing record links</b></p> <ul style="list-style-type: none"> <li>• For URLs already linked to bibliographic records, the system retains the links unchanged. Existing links are not listed in system messages reporting results of a Link URLs to WorldCat Records action.</li> </ul>

	<b>Action</b>
5	<p><b>Next steps</b>                      When finished linking pathfinder URLs, continue editing the pathfinder or save it for later completion.                      Then add the (new) pathfinder to the pathfinder database or replace the (existing) pathfinder in the pathfinder database.</p>

**Create and link multiple records for URLs in a pathfinder**

**E-mail address required**

- The function that creates multiple records needs your e-mail address to send you a list of new records added to your save file. If you entered your e-mail address on the Account Options screen, the address you provided already appears in the **Send notice to** box.
- To supply the address, enter it on the User Information screen. On the General tab, under Admin Options, click User Information. At the User Information screen, check your contact information, including your e-mail address.
- If any item is missing or incorrect, edit as necessary, type your password in the Current Password box, and click **Update**.

	<b>Action</b>
1	<p>Complete other work on the pathfinder and then Add it to the pathfinder database (new pathfinder).                      Or                      Replace it in the database (revised pathfinder).</p>
2	<p>On the Action list, click <b>Export Pathfinder Link</b>.                      A new browser window opens containing 2 versions of a link to the pathfinder: a PURL (Persistent URL) and a standard URL.</p>
3	<p>Highlight the text of the PURL or URL. On the browser's Edit menu click <b>Copy</b>.</p>
4	<p>On the Cataloging tab, under Create Options, click <b>Multiple Records</b>.                      At the Create Multiple Records screen, paste the PURL or URL for your pathfinder into the text box. Click in the text box; on the browser's Edit menu click <b>Paste</b>.                      Set other options on the screen if desired.                      Then click <b>Create</b>.</p> <p>For each URL in the pathfinder, the system searches for the URL in WorldCat. If no record exists for the URL, the system creates a preliminary bibliographic record and adds the record to your save file with the status <b>Extracted</b>. Then the system sends you an e-mail message listing URLs for which records were created, with the save file number for each record.</p> <p><b>Note: Create records from a web site for use in pathfinder.</b> You can also create multiple records from a web site that provides links you want to include in your pathfinder. On the Create Multiple Records screen, enter the site's URL in the text box and click <b>Create</b>.</p>
5	<p>Retrieve the preliminary records (status: Extracted) from the save file, complete them, and add them to WorldCat.</p>

	Action
6	Edit the pathfinder you are building and take the <b>Link URLs to WorldCat Records</b> action to link the new bibliographic records to the pathfinder. See the previous section for details.
7	<b>Next steps</b> When finished linking pathfinder URLs, continue editing the pathfinder or save it for later completion. Then add the (new) pathfinder to the pathfinder database or replace the (existing) pathfinder in the pathfinder database.

**Add an embedded Search element**

	Action
1	Add a Search element to the pathfinder.
2	Construct and test the search using the Query Builder or Free Text Query Builder.
3	Add the (new) pathfinder to the pathfinder database or replace the (revised) pathfinder.
4	Export a pathfinder link and place the link (URL or PURL) on a page on your web site.

**Add a Flagged Records element**

	Action
1	Flag a set of bibliographic records that describe resources you want to include in a pathfinder.
2	Edit the pathfinder you are building and add a Flagged Records element.
3	Edit the inserted Link elements if necessary to modify descriptions or set options.
4	Add the (new) pathfinder to the pathfinder database or replace the (revised) pathfinder.

**Create a bibliographic record for the pathfinder**

**New pathfinder**

	Action
1	Create a new pathfinder. Or Retrieve a new pathfinder from the pathfinder save file.
2	Complete your work on the pathfinder.
3	On the Action list, click <b>Add Pathfinder</b> . Click <b>OK</b> to confirm that you want to add the pathfinder.  The system asks whether you want to create a preliminary bibliographic record for the new pathfinder.

	Action
4	<p>Click <b>OK</b> to have the system create a preliminary record.</p> <p>The system asks you to supply your e-mail address (or check the address displayed in the box). Type your e-mail address in the box provided. Or Verify that the displayed e-mail address is correct. Then click <b>Create</b>.</p>
5	<p>When you receive e-mail notification that the system has created a preliminary record for the pathfinder, Retrieve the record from the save file. Complete the preliminary record and add it to WorldCat.</p>

**Existing pathfinder (in pathfinder database)**

	Action
1	Retrieve the pathfinder from the pathfinder database and take the <b>Export Pathfinder Link</b> action.
2	On the Cataloging tab, under Create Options, click <b>Single Record</b> ; enter the pathfinder link (URL or PURL) in the text box and click <b>Create</b> .
3	Complete the resulting preliminary record and add it to WorldCat.

**Correct titles displayed for linked bibliographic records**

**Why use this function?**

- Ensure that record titles shown in a pathfinder match the titles provided in the current records in WorldCat.

**How it works**

- The system checks for changes in the titles of bibliographic records linked to the pathfinder.
- If the title found in the record does not match the title displayed in the pathfinder, the system corrects the title in the pathfinder.

	<b>Action</b>
1	<p>Edit a pathfinder that contains links to bibliographic records.</p> <p>If the system responds with a message asking you to clone (derive a new pathfinder from) the pathfinder, click the <b>Clone</b> button to create a copy of the pathfinder for editing.</p>
2	<p>On the Edit list, click <b>Correct Titles for Linked WorldCat Records</b>.</p> <p>For any title shown in the pathfinder that does not match the title in the bibliographic record, the system replaces the existing title with the correct text from the record.</p> <p>If all record titles shown in the pathfinder are correct (match the title found in the bibliographic record), the system displays a message confirming that no incorrect titles were found.</p>

## 5 Add flagged pathfinders

### Why include other pathfinders?

- Build on the work of other contributors to the pathfinder collection.
- Merge pathfinders created by individual staff members to produce a comprehensive resource for library users.

### Tips on using flagged pathfinders

- Consider whether adding links from other pathfinders may produce an excessively long page that is too long for convenient use. Consider using links to related pathfinders instead of importing them.
- Remember that you cannot edit content in added pathfinders while editing the destination pathfinder. You must edit pathfinders you plan to include before using the Flagged Pathfinders function. You must derive new pathfinders from (clone) other libraries' pathfinders to make changes.
- The Flagged Pathfinders option works **only** with pathfinders flagged in the **main pathfinder database**. You cannot add pathfinders flagged in the pathfinder save file.

### How to

	Action
1	<p><b>(Optional)</b> Review and edit the pathfinder(s) you want to import. You may need to remove links, revise headers, or otherwise change a pathfinder before importing it.</p> <p>If you are authorized to edit the selected pathfinder, retrieve it, make the necessary changes, and then submit it.</p> <p>If you are not authorized to edit the selected pathfinder, retrieve it, derive a new pathfinder from it, edit it as necessary, and submit it.</p>
2	Flag 1 or more pathfinder(s) with content you want to import into a primary pathfinder.
3	Open the primary pathfinder (the destination for the imported content) in an editing view.
4	<p>Move to the element above the position at which you want to add a flagged pathfinder.</p> <p><b>Linear view.</b> Scroll the Editing Pathfinder screen to locate the element.</p> <p><b>Outline view.</b> In the outline area, click the hyperlinked title or URL of the element. You may need to expand sections to display titles for all links, subheaders, etc.</p>

	<b>Action</b>
5	<p>Select the element type <b>Flagged Pathfinders</b>. Click the arrow to open the list of element types. The list box shows the current element type (Link or Header, etc.). In the list of element types, click <b>Flagged Pathfinders</b>. The system asks you whether you want the flags removed from the flagged pathfinder(s) after importing to the current pathfinder. Click <b>OK</b> to unflag the pathfinder(s) after insertion. Click <b>Cancel</b> to retain the flags. <b>Note:</b> Unflag the pathfinder(s) unless you want to add them to another pathfinder.</p> <p><b>Results</b> The system adds a new element below the current element with the element type <b>Import</b>. A link to the flagged pathfinder appears within the new Import element.</p>
6	<p>Review the added content. After you add the Import element, in the pathfinder editing template, scroll to the top of the screen. On the Edit list, click <b>Display Pathfinder</b>.</p>

## 6 Add pathfinder

### When to add a pathfinder to the database

- When you have completed work on a pathfinder.
- To save a new pathfinder for later completion, place it in your library's pathfinder save file. On the Action list, click **Save Pathfinder**.

### How to add a pathfinder

	Action
1	Create a pathfinder and complete editing. Or Retrieve a new pathfinder from the pathfinder save file.
2	On the Action list, click <b>Add Pathfinder</b> . Click <b>OK</b> to confirm that you want to add the pathfinder. If you click <b>OK</b> , the system asks whether you want to create a preliminary bibliographic record for the new pathfinder. Or Click <b>Cancel</b> if you want to stop without adding the pathfinder. If you cancel adding the pathfinder, the system redisplay the pathfinder for further editing.
3	Continue adding the pathfinder Click <b>OK</b> to have the system create a preliminary record. Click <b>Cancel</b> to skip creating a preliminary record and continue adding the pathfinder to the database.  If creating a preliminary bibliographic record, The system asks you to supply your e-mail address (or check the address displayed in the box). Type your e-mail address in the box provided. Or Verify that the displayed e-mail address is correct. Then click <b>Create</b> .
4	After adding the new pathfinder, the system Displays a confirmation message. Redisplays the pathfinder with its newly assigned pathfinder number.
5	If creating a preliminary bibliographic record When you receive e-mail notification that the system has created a preliminary record for the pathfinder, Retrieve the record from the Save File. Complete the preliminary record and add it to the Resource Catalog and WorldCat.

## 7 Pathfinder actions: summary

While working with a pathfinder, you can take the following actions. Some actions are available in edit mode only. A few actions are available in display mode only. Some actions are available for pathfinders in the pathfinder database only; other actions are available only for pathfinders in the pathfinder save file.

Action	How to
Display pathfinder	<p>From a pathfinder edit view (outline or linear), On the Edit list, click <b>Display Pathfinder</b>.</p> <p>From a brief entry on a results screen, Click the hyperlinked title of the pathfinder you want to display. The system presents the pathfinder in HTML format. You can check the organization, verify correct formatting, and test navigation.</p> <p>In the displayed pathfinder</p> <ul style="list-style-type: none"> <li>• <b>Embedded search.</b> The system performs any embedded searches against WorldCat and includes the results in the pathfinder.</li> <li>• <b>URL display.</b> The system displays the URL of each resource in parentheses after the title. For items with corresponding bibliographic records, the system shows the first URL unless you chose to override defaults and specified the URL to show by a number.</li> <li>• <b>Resource links.</b> For items inserted by creating an embedded search, by adding flagged records, or by taking the Link URLs to WorldCat Records action, the system shows or hides links to bibliographic records as specified them using the Resource Links option (Pathfinder Header: Format Option).</li> <li>• <b>Customization for Links.</b> For items inserted by creating an embedded search, by adding flagged records, or by taking the Link URLs to WorldCat Records action, the system displays the title and description from the bibliographic record or a title and/or description you entered in the pathfinder Link element.</li> <li>• <b>Format options.</b> If you specified a stylesheet, inserted images, specified sorting for headers or links, defined separators, or set other format options, the displayed pathfinder reflects your choices.</li> <li>• <b>HTML code embedded in Description fields.</b> If you set the <b>Embedded HTML?</b> option to <b>Yes</b> for a Description field (in any pathfinder element) and also inserted the HTML code required, the displayed pathfinder shows the browser's rendering of the embedded code. For example, the pathfinder reflects text formatting code such as a line break (&lt;br&gt;) or displays an image you included (&lt;IMG SRC=" "&gt;) or includes a link to related content. If <b>Embedded HTML?</b> is set to <b>No</b> (default setting), the browser treats the Description as text only.</li> <li>• <b>Access restrictions.</b> For Licensed Resource elements, if you specified access restrictions using the <b>Access available to</b> option, information on restrictions appears immediately after the link to the resource.</li> </ul>

Action	How to
Edit pathfinder	<p>From a pathfinder display view, On the Edit list, click <b>Edit Pathfinder</b>.</p> <p>From a brief entry on a results screen, Click the <b>Edit</b> button next to the title of the pathfinder you want to edit.</p> <p>If the system responds with a message asking you to clone the pathfinder, click the <b>Clone</b> button to create a copy of the pathfinder for editing.</p> <p>The system presents the pathfinder in the edit view (outline or linear) you specified in Display Options.</p>
Change edit view	<p>Scroll to the beginning of the pathfinder. Open the View list and click <b>Outline</b> or <b>Linear</b>.</p>
Derive new pathfinder	<p>From a pathfinder display or edit view, On the Edit list, click <b>Derive New Pathfinder</b>.</p> <p>The system displays the prompt <code>Do you want to preserve local content?</code></p> <p>Click <b>OK</b> to include local-content elements in the new (cloned) pathfinder.</p> <p>Click <b>Cancel</b> to exclude local-content elements.</p> <p>The pathfinder content is redisplayed in an editing template. NEW appears in the Pathfinder: field. When you submit the new pathfinder, the system supplies a pathfinder number.</p>
Delete pathfinder from the main pathfinder database (your library's pathfinders only)	<p>View (display or edit the pathfinder you want to delete. On the Action list, click <b>Delete Pathfinder</b>.</p> <p>The system asks you to confirm that you want to delete the pathfinder. To delete the pathfinder, click <b>Yes</b> or <b>Yes, wait for response</b>. To cancel deleting the pathfinder, click <b>No</b>.</p>
Delete pathfinder from pathfinder save file	<p>Retrieve a saved pathfinder you want to delete. On the Action list, click <b>Delete Save File Record</b>.</p> <p>Click <b>OK</b> to confirm that you want to delete the pathfinder. The system removes the working copy of the pathfinder from the pathfinder save file. The master pathfinder remains in the pathfinder database.</p>
Derive a constant data record from a pathfinder	<p>This action creates a pathfinder constant data record with the content of any pathfinder.</p> <ol style="list-style-type: none"> <li>1. Retrieve and view the pathfinder on which to base a constant data record.</li> <li>2. On the Edit list click Derive New Constant Data Record.</li> <li>3. Edit the content for the constant data record.</li> <li>4. On the Action list, click <b>Save Constant Data Record</b>.</li> <li>5. In the dialog box, enter a name for the pathfinder constant data record. Use a name that indicates the content or purpose of the pathfinder constant data.</li> <li>6. Then click <b>OK</b> to add the record in your institution's pathfinder constant data database.</li> <li>7. The system displays a confirmation message that includes the constant data name you entered.</li> </ol>

Action	How to
Cancel changes to pathfinder	<p>On the Edit list, click <b>Cancel Changes</b>.                      The system asks you to confirm that you want to cancel your edits.                      Click <b>Yes</b> to discard edits and unlock the pathfinder for editing.                      Click <b>No</b> to keep your changes and continue editing.</p>
Apply default pathfinder constant data	<p>Create a new pathfinder.                      Or                      Retrieve a pathfinder you want to edit from the pathfinder database or the pathfinder save file.                      Edit the pathfinder.                      On the Edit list, click <b>Apply Default Pathfinder Constant Data</b>.</p>
Select Constant Data	<p>On the Edit list, click Select Constant Data                      In the list of constant data records, click the hyperlinked name of the constant data record you want to apply.</p>
Reformat pathfinder	<p>Use the Reformat action to add or delete multiple elements.                      To tag an element for deletion, open the Functions list and click <b>Tag Delete</b>.                      To add an empty element, open the Functions list in the preceding element and click <b>Tag Add</b>. In the dialog box, type the number of elements to add (1 to 10); then click <b>OK</b>.                      On the Edit list, click <b>Reformat Pathfinder</b>.                      The system removes any elements tagged for deletion and adds empty elements at specified positions.</p>
Add pathfinder to the pathfinder database	<p>Create a pathfinder by harvesting, by cloning, or by completing a blank template.                      Or                      Retrieve a saved new pathfinder.                      On the Action list, click <b>Add Pathfinder</b>.                      Click <b>OK</b> to continue and add the pathfinder.                      Click OK to confirm that you want to create a preliminary bibliographic record for the pathfinder. Verify your e-mail address for system notification when the preliminary record is created. Then click <b>Create</b>.</p>
Replace pathfinder in the pathfinder database	<p>Open an edit view of a pathfinder you have been modifying.                      Or                      Retrieve a modified pathfinder from the save file.                      On the Action list, click <b>Replace Pathfinder</b>.                      Click <b>OK</b> to confirm the action.                      The system replaces the master pathfinder with the edited version. If you retrieved a saved pathfinder, the system deletes the working copy from the pathfinder save file.                      Note: Unless your library added the pathfinder to the database or is a designated maintainer of the pathfinder, you cannot modify it.</p>
Save pathfinder	<p>On the Action list, click <b>Save Pathfinder</b>.                      Open the status list and click the status you want to assign to this pathfinder.                      Click <b>Yes</b> to add the pathfinder to the save file.</p>

Action	How to
<p>Export pathfinder as HTML (static page export)</p> <p><b>Not available for a pathfinder in the pathfinder save file</b></p>	<p>On the Action list, click <b>Export HTML</b>.</p> <p><b>Internet Explorer.</b> In the File Download dialog box, select <b>Save to Disk</b> and click <b>OK</b>.</p> <p><b>Netscape Navigator.</b> In the Unknown File Type dialog box, click <b>Save File</b>.</p> <p>In the Save As dialog box, navigate to the folder in which you want to save the HTML file for the pathfinder. In the File Name box, keep the displayed name or replace it with a more informative name. Add htm as the file name extension. Then click <b>Save</b>.</p> <p>Move the exported file to the appropriate location on your Web server.</p> <p>Before exporting the pathfinder,</p> <ul style="list-style-type: none"> <li>• The system runs any embedded search and inserts links to the retrieved records.</li> <li>• For links inserted by adding flagged bibliographic records, the system accesses the associated records to obtain updated URLs before exporting the pathfinder.</li> <li>• However, the search is not rerun nor URLs updated when users access the static pathfinder page.</li> </ul>
<p>Export pathfinder link (dynamic link export)</p> <p><b>Not available for a pathfinder in the pathfinder save file</b></p>	<p>On the Action list, click <b>Export Pathfinder Link</b>.</p> <p>A new browser window opens containing 2 versions of a link to the pathfinder: a PURL (Persistent URL) and a standard URL.</p> <p><b>PURL or URL?</b> In most cases, we recommend that you use the provided PURL as the link to your pathfinder. However, if the pathfinder contains <b>anchors</b> (jumps to elements within the pathfinder page) and if you expect most pathfinder users to have Netscape browsers, use the URL as the pathfinder link. Netscape browsers may have problems connecting to a PURL if the target page contains anchors.</p> <p>Copy 1 of the links and paste it in the appropriate page on your web site. Add an informative title for the link.</p> <p>When users access the pathfinder via the link, the system reruns any embedded searches it contains and supplies updated URLs for any links that come from associated bibliographic records.</p>
<p>Flag or Unflag pathfinder</p>	<p>On the Action list, click <b>Flag Pathfinder</b> or <b>Unflag Pathfinder</b>.</p> <p><b>Note:</b> You cannot flag a new pathfinder (not yet submitted, no pathfinder number).</p>

## 8 Use pathfinders

### Display pathfinder

	Action
1	<p>On the Edit list, click <b>Display Pathfinder</b>.                      The pathfinder appears in HTML format. You can check the organization, verify correct formatting, and test navigation.                      In the displayed pathfinder</p> <ul style="list-style-type: none"> <li>• <b>Dynamic search.</b> The system performs any embedded searches against the Resource Catalog and includes the results in the pathfinder.</li> <li>• <b>URL display.</b> The system displays the URL of each resource in parentheses after the title. For items with corresponding bibliographic records, the first URL appears unless you chose to override defaults and specified the URL to show by a number.</li> <li>• <b>Resource links.</b> For items inserted by creating a dynamic search or by adding flagged records, the system shows or hides links to bibliographic records as specified them using the Resource Links option (Pathfinder Header: Format Option).</li> <li>• <b>Customization for Links.</b> For items inserted by creating a dynamic search or by adding flagged records, the system displays the title and description from the bibliographic record or a title and/or description you entered in the pathfinder Link element.</li> <li>• <b>Format options.</b> If you specified a stylesheet, inserted images, defined separators, or set other format options, the displayed pathfinder reflects your choices.</li> <li>• <b>HTML code embedded in Description fields.</b> If you set the Embedded HTML? option to Yes for a Description field (in any pathfinder element) and also inserted the HTML code required, the displayed pathfinder shows the browser's interpretation of the embedded code. For example, the pathfinder reflects text formatting code such as a line break (&lt;br&gt;) or displays an image you included (&lt;IMG SRC=" "&gt;).</li> </ul>

### Edit pathfinder

	Action
1	<p>On the Edit list, click <b>Edit Pathfinder</b>.                      The pathfinder is redisplayed in an editing template.  <b>Note:</b> You cannot edit a pathfinder submitted by another library unless your library has been designated a maintainer of that pathfinder. To modify a pathfinder you are not authorized to edit, display the pathfinder and derive a new pathfinder from it (clone it).</p>

**Save pathfinder**

	Action
1	Retrieve an existing pathfinder in a display view or an edit view. Or Create a new pathfinder by extracting, by cloning, or by completing a blank pathfinder template.
2	On the Action list click <b>Save Pathfinder</b> . The system asks you to confirm that you want to save the pathfinder and to supply a workflow status.
3	Select a workflow status for the saved pathfinder. Open the status list and click the status you want to assign to this pathfinder.
4	Click <b>Yes</b> to add the pathfinder to the save file. The system saves the pathfinder and displays a confirmation message. Or Click <b>No</b> to cancel saving the pathfinder. The system redisplay the pathfinder in the view you were using.

**Delete pathfinder  
(pathfinder database)**

	Action
1	On the Action, list click <b>Delete Pathfinder</b> . The systems responds: Are you sure you want to delete this pathfinder? <b>Note:</b> You cannot delete a pathfinder submitted by another library unless your library has been designated a maintainer of that pathfinder.
2	Click <b>Yes</b> or <b>Yes, Wait for response</b> . The system deletes the record from the pathfinder database and displays a confirmation message.

**Derive new pathfinder**

	Action
1	On the Edit list, click <b>Derive New Pathfinder</b> . The system asks whether you want to preserve local content in the derived pathfinder. Local content refers to pathfinder elements (Link or Library Material or Licensed Resource) for which the Local Record Only? option is set to <b>Yes</b> . Click <b>OK</b> to include local-content elements in the new (derived) pathfinder. Click <b>Cancel</b> to exclude local-content elements. The pathfinder is redisplayed in an editing template. NEW appears in the Pathfinder: field. When you submit a new pathfinder based on the derived pathfinder, the system supplies a number.

## Create Pathfinders and Add Content

### Pathfinder export options

**Note: No export from pathfinder save file.** You can export pathfinders from the main pathfinder database only. You cannot export a saved working copy of a pathfinder from the pathfinder save file.

Export HTML	Export pathfinder link
<p>Creates a copy of the pathfinder as a separate HTML file that you can install on your web server.</p> <p>The file contains search results from any query included in the pathfinder; the system runs the query before exporting the pathfinder.</p> <p>For links inserted by adding flagged Resource Catalog records, the system accesses the associated bibliographic records to obtain updated URLs before exporting the pathfinder.</p> <p>However, the query is not rerun nor URLs updated when users access the static pathfinder page.</p> <p>When you export multiple pathfinders, Connexion exports them to a file in HTML.</p>	<p>Creates a link to the pathfinder stored in the pathfinder database.</p> <p>You add the link to a page on your library's web site.</p> <p>When users access the pathfinder via the link, the system reruns any query it contains and supplies updated URLs for any links that come from associated bibliographic records.</p> <p>Not available when exporting multiple pathfinders.</p>

### Export single pathfinder as HTML file

	Action
1	On the Action, list click <b>Export HTML</b> . Your browser displays a dialog box requesting instructions. You must confirm that you want to save the file containing the exported pathfinder.
2	<b>Internet Explorer</b> . In the File Download dialog box, select <b>Save to Disk</b> and click <b>OK</b> . <b>Netscape Navigator</b> . In the Unknown File Type dialog box, click <b>Save File</b> .
3	In the Save As dialog box, navigate to the folder in which you want to save the HTML file for the pathfinder. In the File Name box, keep the displayed name or rename the file. Add <b>.htm</b> as the filename extension. Then click <b>Save</b> .
4	Click <b>OK</b> to close the message box.

## Create Pathfinders and Add Content

### Export single pathfinder as a link

	Action
1	<p>On the Action list, click <b>Export Pathfinder Link</b>.</p> <p>A new browser window opens containing 2 versions of a link to the pathfinder: a PURL (Persistent URL) and a standard URL.</p> <p><b>Note:</b> The benefits of using a PURL are 1) a simpler, more understandable address and 2) an address that remains unchanged even if the pathfinder's actual location changes.</p> <p><b>Note: PURL or URL?</b> In most cases, we recommend that you use the provided PURL as the link to your pathfinder. However, if the pathfinder contains anchors (links to elements within the pathfinder page) and if most pathfinder users have Netscape browsers, use the URL as the pathfinder link. Netscape browsers may have problems connecting to a PURL if the target page contains anchors.</p>
2	<p>Copy one of the links and paste it in the appropriate page on your web site. Add an informative title for the link.</p>

### Export up to 100 pathfinders (HTML only)

- **Export.** Connexion exports up to 100 pathfinders at a time. After the system completes the first 100 pathfinders, you must retrieve any remaining pathfinders, flag them, and then export them.

	Action
1	<p>From the pathfinders database or the pathfinders save file, retrieve and flag a group of pathfinders that you want to export.</p>
2	<p>On the results screen or the Flagged Pathfinders screen or the Flagged SF Records screen, open the Action/Sort list and click <b>Export Flagged Records</b>.</p>
3	<p>At the top of the Export screen, click <b>HTML</b>.</p> <p>Your browser displays a dialog box requesting instructions. You must confirm that you want to save the file containing the exported pathfinder.</p>
4	<p><b>Internet Explorer.</b> In the File Download dialog box, select <b>Save to Disk</b> and click <b>OK</b>.</p> <p><b>Netscape Navigator.</b> In the Unknown File Type dialog box, click <b>Save File</b>.</p>
5	<p>In the Save As dialog box, navigate to the folder in which you want to save the HTML file for the pathfinder. In the File Name box, keep the displayed name or rename the file. Add <b>.htm</b> as the filename extension.</p> <p>Then click <b>Save</b>.</p>
6	<p>Click <b>OK</b> to close the message box.</p>

### Flag and unflag a pathfinder

	Action
1	<p>On the Action list, click <b>Flag Pathfinder</b> or <b>Unflag Pathfinder</b>.</p> <p><b>Note:</b> You cannot flag a new pathfinder (not yet added to the database, no pathfinder number).</p>