

Use the Pathfinder Save File

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OCLC Online Computer Library Center, Inc.
6565 Frantz Road, Dublin, OH 43017-3395

Revision History

Date	Section title	Description of changes
February 2003	1. Use save file; 3. View and use save file results; 4. Show flagged PF SF screen	Revised to add information on new action on flagged records in the save file: Apply Default CD to Flagged Records.
May 2003	1. Use save file 2. Search save file 3. View and use save file results	Updated information on record numbering, display of save file numbers, and maximum number of saved records. Revised to cover new Retain Search option and Clear Search button. Updated information on searching by save file number. Updated information on display of save file numbers in brief entries. Also some minor corrections in this section.
August 2003	1. Use save file	Added a note that OCLC may briefly delay purging of expired records from the save file.
October 2003	2. Search save file	Added information about using the Search History function to view, revise, and reuse previous searches.
November 2003	1. Use save file; 3. View and use save file results; 4. Show flagged PF SF screen; 5. Set status for multiple saved pathfinders	Updated to document new capability to export multiple flagged pathfinders (up to 100) to a file. Describes a change to other flagged record actions (save, apply CD, set status, delete); these actions now process pathfinders in groups of 100.

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6565 Frantz Road
Dublin, OH 43017-3395 USA

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1 Use Pathfinder save file

About the pathfinder save file

- The pathfinder save file is a working storage area for use when completing new pathfinders or modifying existing pathfinders.
- Each library's saved pathfinders are available to users from that library only.
- A library can store up to 9,999 pathfinders in the Save File. The system prevents you from saving a pathfinder that would exceed the limit.
- When saved, each pathfinder is assigned a sequential number. The first number assigned is 1.
- **180-day limit for unmodified existing pathfinders.** Saved copies of existing pathfinders that remain in the save file for 180 days without being modified or resaved are deleted automatically. **Note:** Occasionally, OCLC delays purging expired records from the save file. As a result, records may remain in the save file longer than expected.
- **Check expiration dates.** In each brief entry on a save file results list, or in the header in a displayed pathfinder, check the item `Expires in ___ days`. The number of days (shown in red type) is updated daily.
- The last modified date in the pathfinder (shown in the **Modified:** field in a brief entry on a results list and in the **Last Replaced:** field in the pathfinder header) is the beginning of the current 180-day window.
- To reset the counter, retrieve the pathfinder from the save file and save it again. Or flag one or more saved pathfinders, display the flagged pathfinders (Show Flagged SF Records), and then take the **Save Flagged Records** action. Changing the status of multiple saved pathfinders does not reset the expiration counter for the pathfinders.
- New pathfinders created by extracting, cloning, or completing a blank template) are **not** automatically added to the save file. If you do not plan to complete the pathfinder during your current session, use the **Save Record** action to store the record in the save file.
- Only users from the library that created a pathfinder or from a library designated a maintainer of the pathfinder can save an existing pathfinder. Other users must clone the pathfinder; they can then save it (as a new pathfinder) in the pathfinder save file for their own institution.
- You can **save an existing pathfinder** While editing or displaying the pathfinder. The system places a long-term lock (180 days) on the pathfinder and adds a working copy of the pathfinder to the save file. Other users can retrieve and display the pathfinder or clone the pathfinder. No other user can change the pathfinder until you replace it with the edited copy or release the lock (**Cancel Changes** action).

Save a pathfinder

	Action
1	Retrieve an existing pathfinder in a display view or an edit view. Or Create a new pathfinder by extracting, by deriving, or by completing a blank pathfinder template.
2	On the Action list, click Save Pathfinder . The system asks you to confirm the action and to select 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 Yes to add the pathfinder to the save file. The system saves the pathfinder and displays the save file number. Or Click No to cancel saving the pathfinder. The system redisplay the pathfinder in the view you were using.

Pathfinder save file statuses

Status	Description
New	Workflow statuses users can assign to a pathfinder when adding it to the save file or when resaving it after editing. For example, to indicate that you have finished initial changes to a new pathfinder, you can change the pathfinder’s status to In-process .
In process	
In review	
Complete	

Actions on saved pathfinders

Note: Actions on more than 100 pathfinders

- **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.
- **Save, delete, apply constant data, or change status.** Connexion can process more than 100 pathfinders for these actions. After processing 100 pathfinders, the system asks you to confirm that you want to continue.

Action	How to
Apply Default Constant Data to Flagged Records	<ol style="list-style-type: none"> 1. Retrieve and flag saved pathfinders to which you want to apply default constant data. 2. (Optional) To list flagged pathfinders not in the current results set, on the Pathfinders tab, under Show Options, click Flagged SF Records. 3. On the save file results screen or on the Flagged SF Records screen, open the Action/Sort list and click Apply Default CD to Flagged Records. <p>The system adds the default constant data.</p>

Action	How to
Change status of multiple saved pathfinders	<p>Retrieve and flag saved pathfinders for which you want to change the status.</p> <p>On the Pathfinders tab, under Show, click Flagged SF Records.</p> <p>On the Flagged SF Records screen, open the Action/Sort list and click Change Flagged Record Status.</p> <p>The system resets the 180-day expiration counter for each flagged pathfinder.</p>
Resave pathfinder (with or without modifying)	<p>Retrieve a saved pathfinder.</p> <p>On the Action list, click Save Pathfinder.</p> <p>Change the status of the pathfinder is desired. Then click Yes to save the pathfinder.</p> <p>The system resets the 180-day expiration counter.</p>
Resave multiple saved pathfinders	<p>Retrieve and flag saved pathfinders you want to resave to reset the expiration dates.</p> <p>On the Pathfinders tab, under Show, click Flagged SF Records.</p> <p>On the Flagged SF Records screen, open the Action/Sort list and click Save Flagged Records.</p> <p>The system resets the 180-day expiration counter for each flagged pathfinder.</p>
Export saved pathfinder	<p>Retrieve a saved pathfinder.</p> <p>Open the Action list and click Export HTML or Export Pathfinder Link.</p> <p>Note</p> <p>You cannot export a new pathfinder not yet added to the pathfinders database; to be exported, the pathfinder must have a pathfinder number.</p>
Export multiple saved pathfinders 100 maximum	<ol style="list-style-type: none"> 1. Retrieve and flag a group of saved pathfinders that you want to export. 2. (Optional) To list flagged pathfinders not in the current results set, on the Pathfinders tab, under Show, click Flagged SF Records. 3. On the save file results screen or on the Flagged SF Records screen, open the Action/Sort list and click Export Flagged Records. 4. At the top of the Export screen, click HTML. <p>Note</p> <p>You cannot export a new pathfinder not yet added to the pathfinders database; to be exported, the pathfinder must have a pathfinder number.</p>
Delete pathfinder from save file	<p>Retrieve a saved pathfinder you want to delete.</p> <p>On the Action list, click Delete from Save File.</p> <p>Click OK to confirm that you want to delete the pathfinder.</p> <p>The system removes the working copy of the pathfinder from the pathfinder save file. The master pathfinder remains in the pathfinder database.</p>

Use the Pathfinder Save File

Action	How to
Delete multiple saved pathfinders	Retrieve and flag saved pathfinders you want to delete. On the Pathfinders tab, under Show, click Flagged SF Records . On the Flagged SF Records screen, open the Action/Sort list and click Delete Flagged Records . Click OK to confirm that you want to delete the flagged pathfinders. The flagged pathfinders are removed from the pathfinder save file. The master pathfinders remain in the pathfinder database.
Edit saved pathfinder	Save file results list. Click the Edit button in front of the title of the pathfinder you want to edit. Pathfinder in display mode. On the Edit list, click Edit Pathfinder .
Flag pathfinder	Save file results list. Click the open box in front of the title of the pathfinder. Or on the Action/Sort list, click Flag All on Page or Flag All Records Retrieved . Full pathfinder. On the Action list, click Flag Pathfinder .
Unflag pathfinder	Save file results list. Click the check mark in front of the title of the flagged pathfinder. Or on the Action/Sort list, click Clear Flags on Page or Clear All Flags . Full pathfinder. On the Action list, click UnFlag Pathfinder .

2 Search the Pathfinder save file

Find all saved pathfinders

	Action
1	On the Pathfinders tab, under Search, click Save File . The system displays the Search Pathfinder Save File screen.
2	In the search form, leave all text boxes empty.
3	Click Search or press <Enter>.

Find saved pathfinders by status

	Action
1	On the Pathfinders tab, under Show, click By Status . The system displays the Status List screen for your library.
2	Under Show Pathfinder Save File , select the check box for the status category of the pathfinders you want to retrieve. Then click Show Records . The system displays a list of pathfinders in your library's save file with the specified status.

	Action
1	On the Pathfinders tab, under Search, click Save File . The system displays the Search Save File screen.
2	At the bottom of the search form, open the with status list and click the status category for which you want to retrieve saved pathfinders.
3	Check the status specification. Clear search <ul style="list-style-type: none"> • To clear the specified status value, click Clear Search. • Index lists retain the last index you selected. • The operator list retains the last operator you selected. • The Retain Search check box retains its setting (selected or cleared).
4	Click Search or press <Enter>. The system displays a list of pathfinders in your library's save file with the specified status. Retain search <ul style="list-style-type: none"> • To preserve the status value you specified, select the Retain Search check box. • If Retain Search is not selected (the default setting), the system clears the status value.

Find specific saved pathfinders

	Action
1	On the Pathfinders tab, under Search, click Save File .
2	At the Search Save File screen, Construct a search to specify the pathfinder(s) you want to retrieve. <ul style="list-style-type: none"> • Type search 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. • To search for 2 or more terms in the same index, type the terms in 1 text box and select an index. Spaces between words are treated as and operators; you can also combine terms with or and/or exclude terms with not. • To search for 2 terms in different 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. • To retrieve all saved pathfinders with a specific status, open the with status list and click the status you want. You can specify a status as your only search criterion or combine a status limit with other search terms.
3	Check the search form for errors in the terms, index selections, or operators. Clear search <ul style="list-style-type: none"> • To clear the text boxes and any specified status value, click Clear Search. • Index lists retain the last index you selected. • The operator list retains the last operator you selected. • The Retain Search check box retains its setting (selected or cleared).
4	When finished constructing the search, click Search or press <Enter>. Retain Search <ul style="list-style-type: none"> • To preserve keywords you typed in the text boxes and any status value you specified, select the Retain Search check box. • If Retain Search is not selected (the default setting), the system clears the text boxes and status value. Index lists always retain the last index you selected. The list of Boolean operators always retains the last operator you selected. Check boxes always retain their last settings.

Search history: view and use previous searches

- Use the Search History window to
 - View your previous 10 save file searches.
 - Repeat a previous search.
 - Revise a previous search.
- Previous searches are associated with your authorization number and are retained between Connexion sessions. The search history is not cleared when you log off.

Search History function	How to use
Open Search History window	At the Search Pathfinders Save File screen, <ul style="list-style-type: none"> • Click Search History or press <Alt><=>.

Use the Pathfinder Save File

Search History function	How to use
List of previous searches	For each listed search, the window shows <ul style="list-style-type: none"> • Search type: Pathfinders Save File. • Timestamp: date and time the search was performed. • Search criteria: all search elements, including terms, indexes, and specified status values.
Repeat a previous search	<ul style="list-style-type: none"> • Click Repeat. Connexion immediately performs the selected search.
Revise a previous search	<ul style="list-style-type: none"> • Click Revise. Results <ul style="list-style-type: none"> • Connexion displays the Search Pathfinders Save File screen. The selected search is ready for revision.
Clear search history	<ul style="list-style-type: none"> • Click Clear History (at the top of the Search History window).
Close the Search History window	<ul style="list-style-type: none"> • Click Close (at the top of the Search History window).

Save file indexes

Index (label)	Definition	Format / example	Retrieves
Save File Number (sn) (Slot number)	Sequential number assigned when you saved the pathfinder. Appears in the Save File # field at the top of the pathfinder.	Type the number for the pathfinder you want. Save file numbers can be up to 4 digits, ranging from 1 to 9,999	Single saved pathfinder with this unique identifier.
Record number (rn)	Pathfinder number assigned by the system when you add a pathfinder to the pathfinder database. Appears in the Pathfinder: field at the top of the pathfinder.	Type the complete number exactly as it appears in the pathfinder. In pathfinder: 555 In search form: 555	Single saved pathfinder with this unique identifier.

Index (label)	Definition	Format / example	Retrieves
Title (ti)	Word(s) in the title of the pathfinder.	Type 1 or more distinctive words from the title, separated by spaces. A space is treated as an AND operator. Combine words with OR to expand the search; exclude words with NOT to focus the search. In pathfinder: Smithsonian Institution: American Inventors and Innovation In search form: smithsonian innovation	Saved pathfinders whose Titles contain the specified word(s).
Status (cs:) Specified via with status list	Workflow status assigned to the pathfinder.	Open the with status list at the bottom of the search form and click the name of the status you want. In pathfinder: <i>New</i> In search form: new	Saved pathfinders with the specified status (that meet any other criteria set in the search form).
Used date (ud)	Date the pathfinder was last modified or resaved. Appears in the Modified: field in the brief entry and in the pathfinder header.	Type all 8 digits of the date, in order as in pathfinder: <i>yyyymmdd</i> . Omit hyphens or any other separators. Example: In pathfinder: <i>2000-06-04</i> In search form: 20000604	Saved pathfinders last modified on the specified date.

Include variant terms: truncation and wildcards

Technique	How to
Search for the first part of a word; include variant word endings	Use truncation to expand a term to include variant endings or when you know only the first part of a term. Type the first characters of the term (include as many characters as you know); then type an asterisk (*). Examples: <i>librar*</i> , <i>comput*</i>

Technique	How to
Include variant spellings	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. Examples: col?r retrieves <i>color</i> or <i>colour</i> ; int?net retrieves <i>internet</i> or <i>intranet</i> . Use the number sign to retrieve variants of exactly 1 character. Example: wom#n retrieves both <i>woman</i> and <i>women</i> .

Combine terms in one index

To specify	Enter	Example
Multiple terms, all terms required (AND)	[term1] [term2] Or [term1] and [term2] A space between terms is treated as an and .	transportation safety
Multiple terms, at least one term required (OR)	[term1] or [term2]	radiography or radiology
One or more terms that must not be found (NOT)	[term1] [term2] not [term3] Or [term1] or [term2] not [term3]	college education not elementary
One or more groups of terms combined with other terms (parentheses)	[term1] ([term2] or [term2]) [term1] or ([term2] or [term3]) [term1] or ([term2] [term]3)	clinical (trial* or research)

Combine terms in multiple indexes

Operator	Retrieves	Example
AND (default)	Records that contain both of the combined terms in the field(s) specified for each term	food [Title] and 20000605 [Used Date] food [Title] and safety [Title]
OR	Records that contain at least 1 of the combined terms in the field(s) specified for that term; pathfinders can contain either term or both terms	food [Title] or 20000605 [Used Date] safety [Title] or food [Title]
NOT	Records that do not contain the term that follows NOT in the field(s) specified.	food [Title] or 20000605 [Used Date] not safety [Title]

Use the Pathfinder Save File

Pathfinder save file statuses

Status	Description
New	Workflow status users can assign to a pathfinder when adding it to the save file or when resaving it after editing. For example, to indicate that you have finished initial changes to a new pathfinder, you can change the pathfinder's status to In-process .
In process	
In review	
Complete	

3 View and use PF save file search results

Results display

Pathfinders Found	Results Display
No pathfinders found	The system redisplay the Search screen and notifies you that no records were found. The search entry form retains the search term(s) you used.
1 pathfinder found	The system displays the full pathfinder.
Up to 10 pathfinders	<ul style="list-style-type: none"> The results screen lists the titles of all retrieved pathfinders. In each brief entry, the entry number is hyperlinked to the full record.
11 or more pathfinders	<ul style="list-style-type: none"> The results screen lists titles for the first 10 retrieved pathfinders. In each brief entry, the entry number is hyperlinked to the full record. The View List box lets you type an entry number to display 10 entries beginning with that number. The left and right arrow buttons let you move forward or back 10 entries. The View Record box lets you type an entry number to view the full record.

Query display

At the top of the first screen of results, the system displays a message that includes the number of pathfinders retrieved and the query that produced the results. The message provides feedback that lets you see how the system interpreted your search criteria. The display shows:

- Your institution symbol as the first term in any query. Save file searches retrieve pathfinders for your library **only**. **Example:** sm:(OCL) and cs=(OCL:New)
- Each term preceded by an index label identifying the index in which it was searched. **Example:** sm:(OCL) and ti:(college)
- Term groups (terms entered in the same box on the search form and searched in the same index). **Example:** sm:(OCL) and ti:(college education)
- Boolean operators specified to combine terms entered in different boxes on the search form. **Example:** sm:(OCL) not st:(new)

Use this displayed query to

- Diagnose causes for unsatisfactory search results.
- Refine your search to improve results.

Use the Pathfinder Save File

Sort pathfinder save file results (500 or fewer pathfinders)

Action	
1	Scroll to the top of the first screen of search results.
2	<p>On the Action/Sort list, click Sort by Ascending Descending Date or Sort by Descending Date or Sort by Title.</p> <p>Date sort: The system sorts entries in the entire result set by the Modified date of the record (shown in brief entry).</p> <ul style="list-style-type: none"> • Ascending date sort: Records with the earliest Modified date appear first. • Descending date sort: Records with the most recent Modified date appear first. <p>Title sort: The system sorts all entries alphabetically by title. For pathfinders with no title, No Title Provided appears in the brief entry in place of a title. After a title sort, pathfinders without a title appear at the end of the results list.</p>

Check expiration dates of saved pathfinders

Action
<p>In each brief entry, check the item <i>Expires in ___ days</i>. The same information appears in the pathfinder header in a displayed pathfinder. The number of days (shown in red type) is updated daily. Pathfinders not modified or resaved are automatically deleted from the save file after 180 days. To restart aging, resave the pathfinder. When you resave the pathfinder, the system resets the counter to 180 days.</p>

Check save file numbers (slot numbers) of saved pathfinders

Action
<p>The save file number appears in each brief entry. Save file numbers can be up to 4 digits. The save file number also appears in the header in a full record.</p> <p>Save file number search: You can search by save file number to retrieve a specific record.</p>

Move through list (View List and View Record jump bar)

- The **View List** jump bar appears at the top and bottom of each screen of the results list.
- The **View Record** jump bar appears at the top and bottom of each screen of the results list.

Action	How to
Move forward 10 entries	Click the right arrow button (right of View List box).
Move back 10 entries	Click the left arrow button (left of View List box).
View 10 entries beginning with specific entry	Type an entry number in the View List box and press <Enter>.
View a specific record	Click the hyperlinked entry number for the record you want to view. Or Type an entry number in the View Record box and press <Enter>.

Move between records (View Record jump bar)

- The **View Record** jump bar appears at the top and bottom of each record screen.
- The record position indicator (**Record _ of _**) appears at the top and bottom of each record screen. As you move through the records, the indicator changes to reflect your current position in the results list.

Action	How to
View next record in list	Click the right arrow button (right of View Record box).
View previous record in list	Click the left arrow button (left of View Record box).
View a specific record	Type an entry number in the View Record box and press <Enter>.
Return to search results	Click the Search Results button at the top or bottom of the record screen. Or On the Pathfinders tab, under Search Options, Save File, click Search Results .

Actions on results list

Action
Open the Action/Sort list (top right). Click a function.

Action	Result
Flag All on Page	A check mark appears in the box to the left of each entry on this page of the result set.
Clear Flags on Page	Check marks removed from all entries on this page of the results list.

Action	Result
Flag All Records Retrieved	A check mark appears in the box to the left of each entry in the result set (all pages).
Clear All Flags	Check marks removed from all entries on all pages of the results list.
Sort by Ascending Date	The system sorts entries in the entire result set by the Modified date of the pathfinder (shown in brief entry). Pathfinders with the most recent Modified date appear first.
Sort by Descending Date	The system sorts entries in the entire result set by the Modified date of the pathfinder (shown in brief entry). Pathfinders with the earliest Modified date appear first.
Sort by Title	The system sorts all entries alphabetically by title. For pathfinders with no title, No Title Provided appears in the brief entry in place of a title. After a title sort, pathfinders without a title appear at the end of the results list.

Actions on flagged pathfinders

- **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.
- **Save, delete, apply constant data, or change status.** Connexion can process more than 100 pathfinders for these actions. After processing 100 pathfinders, the system asks you to confirm that you want to continue.

On the Action/Sort list, click	Result or next step
Apply Default CD to Flagged Records	The system adds your default pathfinder constant data to all flagged pathfinders.
Change Flagged Record Status	Change status of flagged pathfinders On the Action/Sort list, click Change Flagged Record Status . At the Set Status To screen, open the Set status to: list and click the appropriate status. Available statuses: New, In Process, In Review, and Complete. Click OK to confirm that you want to change the status.
Save Flagged Records (reset expiration dates)	On the Action/Sort list, click Save Flagged Records . Click OK to confirm that you want to save, and reset expiration periods for, the flagged pathfinders.

On the Action/Sort list, click	Result or next step
Export Flagged Records 100 maximum	<ol style="list-style-type: none"> 1. Retrieve and flag a group of saved pathfinders that you want to export. 2. (Optional) To list flagged pathfinders not in the current results set, on the Pathfinders tab, under Show, click Flagged SF Records. 3. On the save file results screen or on the Flagged SF Records screen, open the Action/Sort list and click Export Flagged Records. 4. At the top of the Export screen, click HTML. <p>Note You cannot export a new pathfinder not yet added to the pathfinders database; to be exported, the pathfinder must have a pathfinder number.</p>
Delete Flagged Records	On the Action/Sort list, click Delete Flagged Records . Click OK to confirm that you want to delete the pathfinders.

Actions for brief entry

To	Do this
View pathfinder	Click the hyperlinked entry number in the brief entry.
Begin editing the pathfinder	Click the Edit button to the left of the brief entry.
Flag the pathfinder for further use	Click the check box to the left of the brief entry.
UnFlag pathfinder	Click the check mark to the left of the brief entry.

Edit pathfinder

Action
<p>Click the Edit button in front of the title of the pathfinder you want to edit. The pathfinder appears in an editing template.</p> <p>Note: 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 (clone) it.</p>

Print screens of results list

	Action
1	If the list includes multiple screens, jump to the screen you want to print.
2	Click once in the frame that contains the results list.
3	In your browser, on the File menu, click Print or on the toolbar click the Print button.
4	In the Print dialog box, click OK or press <Enter>.

4 Show Flagged PF Save File screen

Use Flagged Save File screen

- Review a list of brief entries for saved pathfinders flagged (flagged) during the current session.
- Remove flags from all or selected pathfinders.
- Apply default constant data to the flagged pathfinders
- Set a status for the flagged pathfinders.
- Reset the expiration date by resaving the flagged pathfinders.
- Export up to 100 flagged pathfinders.
- Delete flagged pathfinders from the pathfinder save file.
- Display a pathfinder.
- Edit a pathfinder.
- **Note: Cannot import flagged pathfinders from pathfinder save file.** Pathfinders flagged in the pathfinder save file are not included when you add Flagged Pathfinders to a pathfinder you are editing. Only pathfinders flagged in the main pathfinder database are imported. If you have flagged pathfinders only in the save file, the Flagged Pathfinders option does not appear in the list of pathfinder element types.

Use list of flagged pathfinders

Action
On the Action/Sort list, click the action you want to take on the flagged pathfinders.

On the Action/Sort list, click	Result or next step
Flag All on Page	A check mark appears in the box to the left of each entry on this page of the pathfinder list.
Clear Flags on Page	Check marks disappear from all entries on this page of the pathfinder list.
Clear All Flags	Check marks are removed from entries on all pages of the pathfinder list.
Move forward 10 entries	Click the right arrow button (right of View List box).
Move back 10 entries	Click the left arrow button (left of View List box).
View 10 entries beginning with specific entry	Type an entry number in the View List box and press <Enter>.

On the Action/ Sort list, click	Result or next step
View a specific record	Click the hyperlinked entry number for the record you want to view. Or Type an entry number in the View Record box and press <Enter>.
Print a page of the list of flagged records	Jump to the screen you want to print. In the browser, on the File menu click Print . Or On the toolbar click the Print button.

Actions on brief entry

Action	How to
View pathfinder	Click the hyperlinked entry number in the brief entry.
Begin editing saved pathfinder	Click the Edit button to the left of the brief entry.
Unflag pathfinder	Click the check mark to the left of the brief entry. The check mark changes to an open box.
Flag pathfinder	Click the open box to the left of the brief entry. The open box changes to a check mark.

Move between records (View Record jump bar)

- The **View Record** jump bar appears at the top and bottom of each record screen.
- The record position indicator (**Record _ of _**) appears at the top and bottom of each record screen. As you move through the records, the indicator changes to reflect your current position in the results list.

Action	How to
View next record in list	Click the right arrow button (right of View Record box).
View previous record in list	Click the left arrow button (left of View Record box).
View a specific record	Type an entry number in the View Record box and press <Enter>.
Return to flagged records list	Click the Flagged Records button at the top or bottom of the record screen.

Actions on flagged pathfinders

- **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.
- **Save, delete, apply constant data, or change status.** Connexion can process more than 100 pathfinders for these actions. After processing 100 pathfinders, the system asks you to confirm that you want to continue.

On the Action/ Sort list, click	Result or next step
Apply Default CD to Flagged Records	The system adds your default pathfinder constant data to all flagged pathfinders.
Change Flagged Record Status	<p>Change status of flagged pathfinders</p> <p>On the Action/Sort list, click Change Flagged Record Status. At the Set Status To screen, open the Set status to: list and click the appropriate status.</p> <p>Available statuses: New, In Process, In Review, and Complete. Click OK to confirm that you want to change the status.</p>
Save Flagged Records (reset expiration dates)	On the Action/Sort list, click Save Flagged Records . Click OK to confirm that you want to save, and reset expiration periods for, the flagged pathfinders.
Export Flagged Records 100 maximum	<ol style="list-style-type: none"> 1. Retrieve and flag a group of saved pathfinders that you want to export. 2. (Optional) To list flagged pathfinders not in the current results set, on the Pathfinders tab, under Show, click Flagged SF Records. 3. On the save file results screen or on the Flagged SF Records screen, open the Action/Sort list and click Export Flagged Records. 4. At the top of the Export screen, click HTML. <p>Note You cannot export a new pathfinder not yet added to the pathfinders database; to be exported, the pathfinder must have a pathfinder number.</p>
Delete Flagged Records	On the Action/Sort list, click Delete Flagged Records . Click OK to confirm that you want to delete the pathfinders.

No flagged pathfinders in the pathfinder save file

If you have not flagged saved pathfinders during the current session, the system displays the message

You currently have no flagged Pathfinder save file records

If you flagged pathfinders and then logged off or closed your browser without logging off, the system unflagged the pathfinders when your session ended. You must reflag the pathfinders to work with them in your current session.

5 Status list screen: pathfinder save file

Status list for your library

- Statistics for pathfinders in your library's pathfinder save file. Statistics include all your saved pathfinders.
- Total saved pathfinders in each workflow status category.

Use status list

To	Do this
List pathfinders in workflow status categories)	Under Show Pathfinder Save File , click the check box next to each status category to include in the list. Click Show Records .

Statuses for pathfinders

Status	Meaning/purpose
New In Process In Review Complete	Assigned when you save or resave a pathfinder to indicate its position in your library's workflow for developing pathfinders. Only users at the library that creates a pathfinder and staff at other institutions designated as maintainers can save a pathfinder.

6 Set status for multiple saved pathfinders

About the Set Status screen

- The system displays this screen when you use the Show Flagged SF Records function to retrieve saved pathfinders flagged during the current session and then take the **Change Flagged Record Status** action.
- When you select a status, the system assigns that status to the saved pathfinders.
- Changing the status of multiple saved pathfinders does **not** reset their expiration dates. To reset the expiration counter, flag saved pathfinders, display the list of flagged pathfinders (Show Flagged SF Records) and then take the Save Flagged Records action. Or retrieve a saved pathfinder and save it again.

Use this screen

Action	How to
Set status for multiple saved pathfinders	Open the list labeled Set status to and click the status you want to assign to the pathfinders.

Statuses for saved pathfinders

Status	Meaning/purpose
New In Process In Review Complete	Workflow statuses users can assign to a pathfinder when adding it to the save file or when resaving it after editing. For example, to indicate that you have finished initial changes to a new pathfinder, you can change the pathfinder's status to In-process . To change the status of multiple saved pathfinders, flag the pathfinders, retrieve flagged pathfinders, and use the Set Status to action.