

Create and Apply Local Holdings Constant Data

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May 2006	A1. Create LH CD; 2. Apply LH CD by name or from list; 3. Use LH CD.	Updated to document the addition of the Summary field to local holdings constant data records.

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1 Create local holdings constant data

Why create local holdings constant data records?

- Avoid rekeying frequently used information when you create or maintain local holdings records.
- Reduce typing errors and improve consistency among related local holdings records.
- Add specific fields, subfields, or other elements to multiple local holdings records.
- Develop and maintain standards for use in all local holdings records, for certain collections, or for specific types of resources.
- For agents, who frequently make the same change to large numbers of local holdings records, creating and using constant data can be especially useful.

Apply constant data to an LHR

- Once you create and save a constant data record, you can apply the constant data to a local holdings record in three ways:
- **Apply Default CD** applies the LH CD record you designated as you default LH constant data.
- With **Apply CD By Name** or **Apply CD From List**, you can select the appropriate CD record to apply to each LHR “on the fly”. You can apply any LH CD record you have created and saved.

About local holdings constant data records

- Users at the same institution (same OCLC symbol) share a local holdings constant data file.
- Any user at an institution can add local holdings constant data records to this file, edit existing local holdings constant data records, use a record as default local holdings constant data, or delete local holdings constant data records.
- Your constant data records are not shared with Connexion users at any other institution.

Create and Apply Local Holdings Constant Data

Create local holdings constant data from a workflow

	Action
1	On the Cataloging tab, under Create Options, click LH Constant Data . The Create Local Holdings Constant Data screen appears.
2	<p>At the top of the screen, click Create or press <Enter>.</p> <p>Result</p> <p>Connexion displays a local holdings CD workflow in MARC Template edit view. The CD workflow contains the following default fields and values:</p> <ul style="list-style-type: none"> • Summary. New LH CD records contain an empty Summary field. If you enter text in the Summary, the entire field is applied to the LHR, If empty, the Summary is not applied. • Encoding Level. (Leader/17) Encoding Level is set to a fill character (the vertical bar or pipe symbol), an invalid value. To validate an LHR, you must select a valid code for this element. in the CD record, select a valid value to apply to LHRs or select * (asterisk) to protect the value present in an LHR. • Record Status (Leader/05), Date Entered (008/00-05), and Date of Report (008/26-31). Record Status is set to n (New); Date Entered and Date of Report are set to the current date. • Field 852. Connexion inserts an 852 that contains your institution symbol and your default holding library code. • Other LHR fields. The workflow contains tags and default subfield codes for the 853, 863, and 866 fields.
3	Enter content you want to reuse in multiple local holdings records.
4	<p>Save the new constant data record.</p> <ul style="list-style-type: none"> • On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
5	<ol style="list-style-type: none"> 1. At the top of the screen, in the text box, enter a name for the local holdings constant data record. Use a name that indicates the content or purpose of the constant data. 2. Set as default CD. If desired, select the check box labeled Make this your default constant data? 3. My Status. If desired, enter text in the My Status text box to help you identify and retrieve the new local holdings CD record. For example, enter your name or initials, a date, or a project number. Note: You can define a default My Status for Local Holdings CD records in Local Holdings Options. The default My Status automatically appears in new local holdings CD records; you can edit the default text if desired. 4. Then click Yes to add the new CD record to your institution's local holdings constant data file. <p>Results</p> <ul style="list-style-type: none"> • When you click Yes, the system adds the new local holdings constant data record and displays a confirmation message. • Then the system redisplay the constant data record as saved: empty fields are removed. • The constant data name you supplied appears at the top of the new local holdings constant data record. • Empty fields and subfields deleted from in LH CD When you save a local holdings CD record, empty fields and subfields are removed. If you want to insert an empty field or subfield in an LHR via constant data, you must supply some text or BLANK before saving the constant data record.

Create and Apply Local Holdings Constant Data

Create constant data record from local holdings record or LH CD record

- The Derive New Constant Data Record action creates a constant data record with the content of any local holdings record (LHR) or local holdings CD record.

	Action
1	Retrieve the local holdings record, or the existing local holdings CD record, on which to base a new local holdings constant data record.
2	<p>On the Edit list click Derive New Constant Data Record or press <Alt><K> and then <4> (or <Alt><J> and then <4>).</p> <p>Results</p> <p>The system displays the new local holdings constant data record.</p> <ul style="list-style-type: none"> Content from the base record transfers to the new CD record, with the following exceptions: Summary. New LH CD records contain an empty Summary field. If you enter text in the Summary, the entire field is applied to the LHR, If empty, the Summary is not applied. Record Status (Leader/05), Date Entered (008/00-05), and Date of Report (008/26-31). Record Status is set to n (New); Date Entered and Date of Report are set to the current date. Field 852. Connexion inserts an 852 that contains your institution symbol and your default holding library code.
3	Complete editing the new local holdings CD record.
4	<p>Save the new local holdings constant data record.</p> <ul style="list-style-type: none"> On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
5	<ol style="list-style-type: none"> At the top of the screen, in the text box, enter a name for the local holdings constant data record. Use a name that indicates the content or purpose of the constant data. Set as default CD. If desired, select the check box labeled Make this your default constant data? My Status. If desired, enter text in the My Status text box to help you identify and retrieve the new local holdings CD record. For example, enter your name or initials, a date, or a project number. Note: You can define a default My Status for Local Holdings CD records in Local Holdings Options. The default My Status automatically appears in new local holdings CD records; you can edit the default text if desired. Then click Yes to add the new CD record to your institution's local holdings constant data file. <p>Results</p> <ul style="list-style-type: none"> When you click Yes, the system adds the new local holdings constant data record and displays a confirmation message. Then the system redisplay the constant data record as saved: empty fields are removed. The constant data name you supplied appears at the top of the new local holdings constant data record. Empty fields and subfields deleted from in LH CD When you save a local holdings CD record, empty fields and subfields are removed. If you want to insert an empty field or subfield in an LHR via constant data, you must supply some text or BLANK before saving the constant data record.

Create and Apply Local Holdings Constant Data

Tip: Control how to apply for Leader, 007, 008, and Summary

By default, the Leader, 007, and 008 in LH constant data **overwrite** corresponding fields in an LHR. If the Summary field in the CD record contains text, it replaces the Summary in the LHR. Although you cannot delete these required fields from the LH CD, you can choose not to apply them, or to apply specific codes only.

Action	Procedure
Do not apply Leader, 007, or 008 from LH CD	In the Functions list for the CD field, click Delete Text to remove all text from the field. The empty field remains in the CD record, but is not applied to an LHR.
Select specific elements to apply from Leader, 007, or 008. (Avoid applying other elements.)	<ol style="list-style-type: none"> 1. Expand the field in the CD record. 2. For each element you do not want to apply to an LHR, select (* - Protected) in the list of values. 3. To avoid applying a text-entry element such as a date, type an asterisk (*) as the first character in the text box. 4. For elements to be applied, specify the values you want for the LHRs.
Do not apply Summary from LH CD	In the Functions list for the CD field, click Delete Text to remove all text from the field. The empty field remains in the CD record, but is not applied to an LHR.
Do not apply other CD fields	In the Functions list for the CD field, click Delete Field to remove the field from the CD record.

Details on controlling how Leader/007/008 are applied to LHRs

- **Avoid applying entire fixed-length field (Leader, 007, or 008.** You can protect an entire fixed-length field in the LHR from being overwritten when you apply CD. In the Functions list for the field you want to protect, click **Delete Text** to remove all text from the field. The empty field remains in the CD record, but is not applied to an LHR.
- **Choose how to apply elements in Leader, 007, or 008.** In the LH constant data record, for elements you want to protect in an LHR, select an asterisk (* - **Protected**) in the list of values. For elements you define by entering text, protect the element in the LHR by typing an asterisk as the first character in the text box. To protect specific character positions for an element (such as a date), enter asterisks for the characters to protect. **Example:** To apply only the first 2 digits of a date, supply the digits you want and substitute asterisks for others: **20****
- **Example:** To preserve the values for Lending Policy (008/20 and Reproduction Policy (008/21) in local holdings records, when creating constant data select * - **Protected** in the list of values for these elements. Or, to apply **only** the values in 008/20 and 008/21, select * - **Protected** for all elements in the 008 **except** those elements.
- **Field 007 treatment.** For field 007, Connexion places some restrictions on protecting elements in an LHR:

- **Category of Resource (007/00)**. You must set a valid code for this element in the constant data; the asterisk * - **Protected** is **not available** in the list of values.
- If Category of Resource in the CD record **matches** the value in the LHR, then 007 elements set to * - **Protected** in CD are not applied. For unprotected 007 elements, the codes set in the CD record are applied to the LHR.
- If Category of Resource in the CD record **does not match** the value in the LHR, then 007 elements set to * - **Protected** in CD are set to **fill characters** (|, the vertical bar or pipe symbol) in the LHR. You must select valid values for these elements before you can replace or add the LHR. For unprotected 007 elements, the codes set in the CD record are applied to the LHR.

Tip: Insert placeholder fields or subfields in LHR via CD

- When you save a local holdings constant data record, empty fields and subfields are removed. If you want to insert an empty field or subfield in an LHR via constant data, you must supply some text or **|BLANK|** in that field/subfield before saving the constant data record.
- **Insert empty fields via constant data.** In the constant data record, include the appropriate MARC tag and either type a few characters in the content area or type **\$a |BLANK|** (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical bar).
- **Insert empty subfields via constant data.** If fields in constant data include subfields that contain valid values, the subfields remain in the field added to the local holdings record. To retain empty subfield codes in a field in constant data, type the following after each subfield code: **|BLANK|**. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added field.
- **Enter the vertical bar symbol.** Press <Shift><\> (backslash). On standard keyboards, the backslash key is above the <Enter> key.

2 Apply local holdings CD from list or by name

Two ways to apply a specific local holdings CD record

- **Apply CD By Name.** Type the name of the CD record you want to apply.
- **Apply CD From List.** Select the CD record to apply from a list of your library's local holdings constant data records.
- **Apply local holdings CD by name or from list.** When you apply constant data to an LHR using the **Apply CD From List** or the **Apply CD By Name** action, you can select "on the fly" the appropriate constant data for each LHR.
- With either method, you can
 - Retrieve and apply any of your local holdings constant data records.
 - Apply a local holdings constant data record without first making it your default constant data.

Local holdings constant data fields applied

- **Whole CD record always applied.** When you apply LH constant data, Connexion always applies all fields present in the CD record to the LHR:
 - **Fixed-length fields (Leader, 007, and 008):** Values of elements in the fixed-length fields (Leader/007/008) in the CD record replace corresponding elements in the LHR, unless the constant data contains asterisks (*) in place of a value. You can prevent a fixed-length field from being applied by using **Delete Text** on the Functions list; the empty field remains in the CD record but is not applied to an LHR.
 - **Summary field.** Text in the Summary field of the LH CD record replaces the contents of the Summary in the LHR. You can prevent the Summary field from being applied by using **Delete Text** on the Functions list; the empty field remains in the CD record but is not applied to an LHR.
 - **Field 852.** Subfield \$a in the CD record (institution symbol) is not applied; subfields \$b and following are applied.
 - **Repeatable fields** in constant data are added to the LHR. Repeatable fields in constant data **do not replace** corresponding fields in the record. Edit the resulting record to combine or delete unwanted fields.
 - **Nonrepeatable fields** Nonrepeatable fields in constant data **replace** corresponding fields in the LHR.

Apply local holdings constant data by name

	Action
1	Retrieve a local holdings record or create a new record and begin editing. Edit mode only. You must be in edit mode to apply constant data.
2	On the Edit list, click Apply CD By Name or press <Alt><K> and then <5> (or <Alt><J> and then <5>). An entry area opens above the record header.

	Action
3	<p>1. In the Specific CD Name text box, type the name of the constant data record you want to apply.</p> <p>2. Click Apply CD or press <Enter>.</p> <p>Results Constant data fields applied. Connexion applies all content in the LH constant data record.</p> <ul style="list-style-type: none"> • Fixed-length fields (Leader, 007, and 008): Values of elements in the fixed-length fields (Leader/007/008) in the CD record replace corresponding elements in the LHR, unless the constant data contains asterisks (*) in place of a value. You can prevent a fixed-length field from being applied by using Delete Text on the Functions list; the empty field remains in the CD record but is not applied to an LHR. • Summary field. Text in the Summary field of the LH CD record replaces the contents of the Summary in the LHR. You can prevent the Summary field from being applied by using Delete Text on the Functions list; the empty field remains in the CD record but is not applied to an LHR. • Field 852. Subfield \$a in the CD record (institution symbol) is not applied; subfields \$b and following are applied. • Repeatable fields in constant data are added to the LHR. Repeatable fields in constant data do not replace corresponding fields in the record. Edit the resulting record to combine or delete unwanted fields. • Nonrepeatable fields Nonrepeatable fields in constant data replace corresponding fields in the LHR.
4	Make any other changes you wish to complete the LHR.
5	<p>Take a final action on the LHR.</p> <ul style="list-style-type: none"> • New record. On the Action list click Add Record or press <Alt><K> and then <N> (or <Alt><J> and then <N>). • Existing record (edited). On the Action list, click Replace Record or press <Alt><K> and then <A> (or <Alt><J> and then <A>).

Apply local holdings constant data from list

	Action
1	Retrieve a local holdings record or create a new record and begin editing. Edit mode only. You must be in edit mode to apply constant data.
2	<ul style="list-style-type: none"> • On the Edit list, click Apply CD From List or press <Alt><K> and then <6> (or <Alt><J> and then <6>). <p>The Select Constant Data window appears, listing your local holdings constant data records. The list is sorted alphabetically by constant data name.</p>

	Action
3	<p>In the list of constant data records, click the hyperlinked name of the constant data record you want to apply.</p> <p>Results Constant data fields applied. Connexion applies all content in the LH constant data record.</p> <ul style="list-style-type: none"> • Fixed-length fields (Leader, 007, and 008): Values of elements in the fixed-length fields (Leader/007/008) in the CD record replace corresponding elements in the LHR, unless the constant data contains asterisks (*) in place of a value. You can prevent a fixed-length field from being applied by using Delete Text on the Functions list; the empty field remains in the CD record but is not applied to an LHR. • Summary field. Text in the Summary field of the LH CD record replaces the contents of the Summary in the LHR. You can prevent the Summary field from being applied by using Delete Text on the Functions list; the empty field remains in the CD record but is not applied to an LHR. • Field 852. Subfield \$a in the CD record (institution symbol) is not applied; subfields \$b and following are applied. • Repeatable fields in constant data are added to the LHR. Repeatable fields in constant data do not replace corresponding fields in the record. Edit the resulting record to combine or delete unwanted fields. • Nonrepeatable fields Nonrepeatable fields in constant data replace corresponding fields in the LHR.
4	<p>Make any other changes you wish to complete the LHR.</p>
5	<p>Take a final action on the LHR.</p> <ul style="list-style-type: none"> • New record. On the Action list click Add Record or press <Alt><K> and then <N> (or <Alt><J> and then <N>). • Existing record (edited). On the Action list, click Replace Record or press <Alt><K> and then <A> (or <Alt><J> and then <A>).

3 Use local holdings constant data

- Constant data for local holdings records**
- **Local holdings constant data record.** A set of MARC fields that contains data you use frequently when creating or editing local holdings records. Local holdings constant data records are stored in a constant data file shared by users at your library. Your local holdings constant data records are not available to users at other institutions.
 - You have two ways to apply any specific constant data record to an LHR you are editing.
 - **Apply CD By Name.** Type the name of the CD record you want to apply.
 - **Apply CD From List.** Select the CD record to apply from a list of your library’s local holdings constant data records.
 - **Default local holdings constant data.** One default local holdings constant data record is associated with each authorization during each session.
 - You can set any of your local holdings constant data records as your default LH constant data.
 - At any time, you can edit your default local holdings constant data or select another LH constant data record to serve as your default LH CD.
 - When you take the **Apply Default CD** action on an LHR, your default local holdings constant data is applied to the LHR you are editing.
 - You must create and save at least one local holdings constant data record before the option **Set as Default Constant Data** is available.
 - **Shared authorizations.** All users of a shared authorization share **one** default constant data record. If you edit the default CD record associated with a shared authorization, or select a different CD record as the default, the change affects all other users of that authorization.

Local holdings constant data records and default LH constant data

The following table clarifies how your default local holdings CD record differs from all other local holdings CD records.

Local holdings constant data record	Default local holdings constant data
Resides in the local holdings constant data file for your library.	Local holdings constant data record associated with your authorization and with your current session. Resides in the local holdings constant data file for your library.
Stored in the local holdings constant data file until a user from your library deletes it.	Remains the default local holdings constant data for your authorization until you select another record as your default CD. Stored in the local holdings constant data file until a user from your library deletes it.

Local holdings constant data record	Default local holdings constant data
<p>Apply to a local holdings record In the LHR you are editing,</p> <ul style="list-style-type: none"> On the Edit list, click Apply CD By Name or press <Alt><K> and then <5>. Type the name of the CD record to apply and click Apply CD. Or On the Edit list, click Apply CD From List or press <Alt><K> and then <6>. In the list, click the name of the CD record to apply. 	<p>Apply to a local holdings record In the LHR you are editing, on the Edit list click Apply Default CD or press <Alt><K> and then <C>.</p>
<p>To edit a local holdings constant data record Retrieve the record from the local holdings constant data file, edit the record, and then save (replace) the edited version in the local holdings constant data file.</p> <p>To create a new constant data record On the Cataloging tab, under Create, click LH Constant Data. At the Create Local Holdings Constant Data screen, click Create. Enter the content you want in the local holdings constant data record, and then save (add) the new record to the local holdings constant data file.</p>	<p>To edit default local holdings constant data On the Cataloging tab, under Show Options, click Default LH CD. Edit the default constant data. When finished revising, resave the record to replace it in the local holdings CD file.</p> <p>Or</p> <p>Retrieve the default CD record from the local holdings constant data file, edit the record, and then save (replace) the edited version in the file.</p> <p>To make another record your default CD record Retrieve a record from the local holdings constant data file and take the Set as Default Constant Data action.</p>
<p>Editing changes the stored local holdings CD record when you save (replace) the previous version with the revised version.</p>	<p>Changes to your default CD affect the local holdings constant data record stored in your library's local holdings constant data file.</p>
<p>The Apply CD By Name action or the Apply CD From List action lets you choose which LH CD record to apply to a local holdings record.</p>	<p>The Apply Default CD action automatically applies the LH CD record designated as your default constant data record.</p>
<p>Can be deleted. Retrieve a local holdings constant data record and take the Delete Constant Data Record action.</p>	<p>Can be deleted by you or another user at your library. If you take the Apply Default CD action after your default CD record has been deleted, or before you have designated a CD record as your default CD, the system displays an error message.</p>

Create and Apply Local Holdings Constant Data

Local holdings constant data fields applied

- **Whole CD record always applied.** When you apply LH constant data, all fields present in the CD record are applied to the LHR.
- **Apply local holdings CD by name or from list.** When you apply constant data to an LHR using the **Apply CD From List** or the **Apply CD By Name** action, you can select “on the fly” the appropriate constant data for each LHR.
- **Apply default local holdings CD.** You **cannot** select different constant data for each LHR when **applying** default constant data. You must set the appropriate CD record as your default constant data record **before** you apply default constant data to an LHR.
- Connexion always applies the entire constant data record to the LHR:
 - **Fixed-length fields (Leader, 007, and 008):** Values of elements in the fixed-length fields (Leader/007/008) in the CD record replace corresponding elements in the LHR, unless the constant data contains asterisks (*) in place of a value. You can prevent a fixed-length field from being applied by using **Delete Text** on the Functions list; the empty field remains in the CD record but is not applied to an LHR.
 - **Summary field.** Text in the Summary field of the LH CD record replaces the contents of the Summary in the LHR. You can prevent the Summary field from being applied by using **Delete Text** on the Functions list; the empty field remains in the CD record but is not applied to an LHR.
 - **Field 852.** Subfield \$a in the CD record (institution symbol) is not applied; subfields \$b and following are applied.
 - **Repeatable fields** in constant data are added to the LHR. Repeatable fields in constant data **do not replace** corresponding fields in the record. Edit the resulting record to combine or delete unwanted fields.
 - **Nonrepeatable fields** Nonrepeatable fields in constant data **replace** corresponding fields in the LHR.

Apply default constant data to a local holdings record

	Action
1	Retrieve a local holdings record or create a new record and begin editing. Edit mode only. You must be in edit mode to apply constant data.
2	On the Edit list, click Apply Default CD or press <Alt><K> and then <C> (or <Alt><J> and then <C>). Connexion applies all content in the default LH constant data.

Create and Apply Local Holdings Constant Data

	Action
3	Make any other changes you wish to complete the LHR.
4	<p>Take a final action on the LHR.</p> <ul style="list-style-type: none"> • New record. On the Action list click Add Record or press <Alt><K> and then <N> (or <Alt><J> and then <N>). • Existing record (edited). On the Action list, click Replace Record or press <Alt><K> and then <A> (or <Alt><J> and then <A>).

Set local holdings constant data record as default LH constant data

Note: When you save a new local holdings constant data record, you can select an option to make the new record your default LH constant data.

	Action
1	Retrieve a local holdings CD record to use as default constant data. On the Cataloging tab, under Search Options, click LH Constant Data .
2	<p>At the Search Local Holdings Constant Data screen,</p> <ul style="list-style-type: none"> • In either text box on the search entry form, type the constant data name or the My Status to retrieve a specific record. Select the correct index from the list to the right of the search entry box. Or • To retrieve a list of all your local holdings constant data records, in the search form, leave the text boxes empty.
3	<p>Click Search or press <Enter>.</p> <p>The system displays the local holdings constant data record(s) that match the query.</p>
4	<p>Set default local holdings CD on results list</p> <p>Click the Set Default button next to the name of the local holdings constant data record you want to become your default local holdings constant data. The selected default constant data record appears in edit mode.</p> <p>View local holdings CD record and set as default</p> <ol style="list-style-type: none"> 1. On the results list, click the record number of the record you want. 2. On the Edit list, click Set as Default Constant Data or press <Alt><K> and then <G> (or <Alt><J> and then <G>).

Edit local holdings constant data record

	Action
1	Retrieve a local holdings CD record to edit.
2	<p>Edit while viewing a constant data record</p> <p>If not already in edit mode, on the Edit list, click Edit Constant Data or press <Alt><K> and then <L> (or <Alt><J> and then <L>).</p> <p>Select record to edit from local holdings constant data search results</p> <p>Click the hyperlinked entry number next to the name of the constant data record you want to edit. The constant data record appears in an edit view.</p>

Create and Apply Local Holdings Constant Data

	Action
3	Modify the constant data record as appropriate.
4	<p>Replace the edited record in the local holdings constant data file.</p> <ul style="list-style-type: none"> On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>). <p>The system asks you to confirm that you want to replace the previous version of the record with the revised version.</p> <ul style="list-style-type: none"> Click Yes to replace the existing record with the edited record. Or click No to cancel the action and resume editing. <p>Results</p> <ul style="list-style-type: none"> The edited version replaces the previous version of the local holdings CD record. You cannot keep the previous version of the record.

Edit default local holdings constant data

	Action
1	<p>On the Cataloging tab, under Show, click Default LH CD.</p> <p>Or</p> <p>Search local holdings constant data and select the default CD record from the results list.</p>
2	Make the necessary changes to your default constant data.
3	<p>Replace the edited record in the local holdings constant data file.</p> <ul style="list-style-type: none"> On the Action list, click Save Constant Data Record or press <Alt><K> and then <S> (or <Alt><J> and then <S>). <p>The system asks you to confirm that you want to replace the previous version of the record with the revised version.</p> <ul style="list-style-type: none"> Click Yes to replace the existing record with the edited record. Or click No to cancel the action and resume editing. <p>Results</p> <ul style="list-style-type: none"> The edited version replaces the previous version of the record and remains set as your default local holdings CD.

Constant data editing limit: one user at a time

- While you are editing a local holdings constant data record retrieved from your library's local holdings constant data file, other library staff cannot edit the same record.
- The record becomes available to other users when you replace the edited record in the local holdings constant data file or when you take the Cancel Changes action.

Logoff warning for unsaved constant data records

- When you click **Logoff** to end a session, Connexion checks for local holdings constant data records currently in edit mode.
- If you started editing a local holdings constant data record or created a new constant data record, but have not saved the new or modified CD record, the system reminds you to complete editing and save the record before logging off.
- To view the CD record(s), on the message screen click **Show Active Records**. Or, on the Cataloging tab, under Show, click **Active Records** or press

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<Ctrl><Shift><9>. At the Active Records screen under Local Holdings Constant Data, click a constant data name or a new constant data record listed as **New**.

- To log off and discard unsaved changes to the record(s), on the message screen click **Logoff immediately**.

4 Find local holdings constant data

Why search for local holdings constant data?

- Retrieve a constant data record to use as default constant data.
- Find a constant data record you want to edit.
- Find a constant data record you want to delete.

Find specific local holdings constant data records

	Action
1	On the Cataloging tab, under Search Options, click LH Constant Data . The Search Local Holdings Constant Data screen appears.
2	<p>In the search form:</p> <ol style="list-style-type: none"> 1. Type the name and/or the My Status text of the constant data record you want to retrieve. 2. Select the Name index or the My Status index from the index list. Type one or more word(s) of the constant data name or the My Status text. <ul style="list-style-type: none"> • Use truncation to include variant endings for a constant data name. Or use truncation when you know only the first part of the name. Type the first characters of the name (include at least 3 characters); then type an asterisk (*). Examples: lib*, image*, digi* • 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>. You must type at least 3 characters of the word before the ? or #. <p>To retrieve a single record, include the complete name.</p>
3	<p>Check the search form for errors.</p> <p>Clear search</p> <ul style="list-style-type: none"> • To clear the text boxes, 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	<p>Click Search or press <Enter>.</p> <p>The system displays the local holdings constant data record(s) that match the query.</p> <p>Retain search</p> <ul style="list-style-type: none"> • To preserve search terms you typed in the text boxes, select the Retain Search check box. • If Retain Search is not selected (the default setting), the system clears the text boxes.

Stopwords

Omit the following words from a constant data search. If you include them, the system removes them before processing the query. If a query contains only stopwords, no records are retrieved.

Stopword list:

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

Search for singular or plural

- To search for either the singular or the plural form of a word in a constant data name or My Status, type both singular and plural forms in the text box and type **or** between the terms. **Examples: serial or serials; catalog or catalogs.**
- Enter the precise word(s) you want to retrieve. The system does **not** automatically search for the singular form of a word when you enter only the plural form.

List all your local holdings constant data records

	Action
1	On the Cataloging tab, under Search Options, click LH Constant Data . The Search Local Holdings Constant Data screen appears.
2	In the search form, leave the text boxes empty.
3	Click Search or press <Enter>. The system displays a list of your local holdings constant data records.

Search history: view and use previous searches

- Use the Search History window to:
 - View your 10 previous 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 Local Holdings Constant Data screen, click Search History or press <Alt><=>.
List of previous searches	For each listed search, the window shows <ul style="list-style-type: none"> • Search type: Local Holdings Constant Data. • Timestamp: date and time the search was performed. • Search criteria: terms, indexes, and operators.
Repeat a previous search	Click Repeat Results . Connexion immediately performs the selected search.

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Search History function	How to use
Revise a previous search	Click Revise . Results Connexion displays the Search Local Holdings Constant Data screen. The selected search is ready for revision.
Clear search history	Click Clear History (at the top of the Search History window).
Close the Search History window	Click Close (at the top of the Search History window).

5 Local holdings constant data search results

Results display

Number of Records Found	Results Display
No records found	The system displays the following message at the top of the Search Local Holdings Constant Data screen: No Records Found for your Search Please change or simplify your search and try again. The search entry form retains the search term(s) you used.
1 record found	The system displays the local holdings constant data record.
Up to 10 records	The system displays the message: [number] records found searching for [search query] in Local Holdings Constant Data <ul style="list-style-type: none"> • The results screen lists the constant data names of all retrieved records. • Records appear in alphabetical order.
11 or more records	The system displays the message: [number] records found searching for [search query] in Local Holdings Constant Data <ul style="list-style-type: none"> • The results screen lists constant data names for the first 10 retrieved records. • The View Record box lets you type an entry number to view 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. • Records appear in alphabetical order.

Query display

At the top of the first screen of results, the system displays a message that includes the number of records 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. Constant data file searches retrieve records for your library **only**. **Example:** in: (OCL)
- The word(s) of the constant data name or My Status you typed in the search form, preceded by the index label (nm:) for the constant data name index. **Example:** in: (OCL) and nm: ("test")

Use this displayed query to

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

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Actions on list of local holdings CD records Use the Action/Sort list on the results screen to take the following action. Open the list and click the action you want.

Action	Result
Sort By Name	The system sorts the list alphabetically by constant data name.
Flag All on Page	A check mark appears in the box to the left of each entry on this page of the result set.
Flag All Records Retrieved	Flag all records in the result set.
Clear Flags on Page	Check marks removed from all entries on this page of the results list.
Clear All flags	Check marks removed from all entries on all pages of the results list.
Delete Flagged Records	The flagged records are removed from your local holdings constant data file.

Check name of default constant data record

Action
At the top of each screen of search results, the system displays the label Default Constant Data Record , followed by the constant data name of the record currently set as your default constant data.

Sort local holdings constant data results (500 or fewer records)

	Action
1	Scroll to the top of the first screen of search results.
2	On the Action/Sort list, click Sort by Name .

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

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

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Action	How to
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 Cataloging tab, under Search Options, Constant Data, click Search Results .

View local holdings CD record from list

Action
View record in edit mode. Click the hyperlinked entry number for the record you want to view. View record in display mode. Click the Display button in front of the entry for the record you want to view.

Show or hide record viewing buttons

- Record viewing buttons are hidden by default. Press <Alt><Y> to show the buttons to the left of each entry.
- Click the **Display** button to view a record in display mode (read-only).

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Action
Press <Alt><Y> to insert a Display button to the left of each brief entry. To hide the buttons, press <Alt><Y> again.

Delete one local holdings constant data record

	Action
1	On the results screen, click the entry number for the constant data record you want to delete. The selected record opens in edit mode.
2	On the Action list, click Delete Constant Data Record or press <Alt><K> and then <X> (or <Alt><J> and then <X>). <ul style="list-style-type: none"> • Click OK to confirm that you want to delete the record. Or • Click Cancel to keep the record in the constant data file.

Delete multiple local holdings constant data records

	Action
1	On the results list, flag the CD records you want to delete. <ul style="list-style-type: none"> • Click the check box for each constant data record you want to delete. Or • On the Action/Sort list click Flag All on Page or Flag All Records Retrieved.
2	(Optional) Retrieve all flagged CD records. If you flagged CD records for deletion that are not in the current results list, view a screen that lists all CD records flagged during your current session. On the Cataloging tab, under Show Options, click Flagged LH CD Records .
3	At the LH CD Search Results screen or the Flagged LH CD Records screen, On the Action/Sort list, click Delete Flagged Records . <ul style="list-style-type: none"> • Click OK to confirm that you want to delete the records. Or • Click Cancel to keep the records in the constant data file.

Use local holdings constant data record as default LH constant data

Action
Click the Set Default button in front of the constant data record you want to use as default local holdings constant data.
Result The full record appears in display view. A message appears at the top of the record to confirm that the record is now your default local holdings constant data.

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Print screens of local holdings constant data results

	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 record 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>.

