

## Use the Authority Save File

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

## Revision History

<b>Date</b>	<b>Section title</b>	<b>Description of changes</b>
May 2004	1. Use save file; 2. Search save file; 3. View and use save file results; 5. Status list screen	Updated to add information on the new Review status category used for retrieving records submitted for review by other institutions.
August 2004	3. View and use save file results 4. Show flagged SF records	Revised to reflect enhanced functionality for actions on saved records: export. Revised to reflect enhanced functionality for actions on flagged records: export.
June 2005	1. Use save file	Minor clarification on record aging.
November 2005	2. Search AF save file	Added list of stopwords for searching the authority save file.

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6565 Frantz Road  
Dublin, OH 43017-3395 USA

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## Table of Contents

### **1 Use Authority save file**

- About the Authority Save File, 5
- Save an authority record, 6
- Statuses for saved authority records, 6
- System-assigned save file record numbers, 7
- Actions on saved authority records, 7

### **2 Search the Authority Save File**

- Find all saved records, 10
- Find saved records by status, 10
- Reviewer: View records for review, 12
- Find specific saved records, 13
- Stopwords, 14
- Search history: view and use previous searches, 14
- Authority Save file indexes, 15
- Search for LCCN (Library of Congress Control Number), 19
- Search for save file numbers (slot numbers), 19
- Search for replace date, 19
- Include variant terms: truncation and wildcards, 20
- Combine terms in one index, 20
- Combine terms in multiple indexes, 21
- Statuses for saved authority records, 21

### **3 View and use AF save file search results**

- Results display, 22
- Query display, 22
- Sort save file results by date, 23
- Sort save file results by main entry, 23
- Check expiration dates of saved records, 23
- Check save file numbers (slot numbers) of saved records, 23
- Show or hide cross references in search results, 23
- Move through list (View List and View Record jump bar), 24
- Move between records (View Record jump bar), 24
- Edit record, 25
- Show or hide record viewing buttons, 25
- Print screens of save file results list, 25
- Flag saved records, 26
- Unflag saved records, 26
- Actions on flagged records, 26
- Actions on saved authority records, 27

### **4 Show Flagged AF Save File screen**

- Use Flagged AF Save File screen, 29
- Actions on list of flagged records, 29
- Actions on brief entry, 30
- Show or hide record viewing buttons, 31
- Move between records (View Record jump bar), 31
- No flagged records in the Authority save file, 31

### **5 Status list screen: authority records**

- Save file status list for your library, 32
- Actions on status list, 32
- Statuses for saved authority records, 32

**6 Set status for multiple saved authority records**

About the Set Status screen, 33

Use this screen, 33

Statuses for saved authority records, 33

## 1 Use Authority save file

### About the Authority Save File

- The Authority Save File is a working storage area for use when completing new authority records or modifying existing records.
- Each library's saved records are available to users from that library only.
- A library can store up to 9,999 records in the save file. The system prevents you from saving a record that would exceed the limit.
- When saved, each record is assigned a sequential number, called the save file number (slot number).
- **90-day limit for records.** Saved copies of existing authority records that remain in the save file for 90 days without being 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.
- **Locked master record unlocked when expired.** A locked master record in the save file is unlocked when the record expires. To reinstate the lock, you must retrieve a new copy of the master record from the Authority File and take the Lock Record action. If you edited the saved copy of the master record, your changes are lost.
- **Check expiration dates.** In each brief entry on a save file results list, or in the header in a full record, check the item `Expires in ___ days`. The number of days (shown in red type) is updated daily.
- The last modified date in the record (shown in the **Last Modified:** field in the record header) is the beginning of the current 90-day window. The Last Modified date is updated each time the Library of Congress approves an authority record added or replaced by an institution.
- **Reset the age of a saved record.** To reset the counter, retrieve the record from the save file and save it again. Or flag record(s) you want to resave and then take the **Save Flagged Records** action. Resaving a master record also extends the long-term lock on the record in the OCLC Authority File. Changing the status of multiple saved records does not reset the expiration counter for the records.
- **Save Authority File records:**
  - **Save a newly created record.** New records created by cloning or generating a blank workform are **not** automatically added to the save file. If you do not plan to complete the record and add it to the Authority File during your current session, use the **Save Record** action to store the record in the save file.
  - **While editing the master record.** The system places a long-term lock (90 days) on the master record in the Authority File and adds a working copy of the record to the save file. Other users can retrieve and display the record or edit the record locally. No other user can change the master record until you replace it with the edited copy or release the lock (by taking the **Release Lock** or **Cancel Changes** action).

—**While editing the record locally.** The master record is not locked, so other users can lock it and modify it. The system places a working copy of the record in the save file. You cannot use the saved (locally edited) record to modify the master record unless you lock and replace the master record. When you lock the master record, you lose changes made while editing locally (unlocked). You can export a record saved while in local edit mode.

- You can **export** a record from the save file **only** if the record has LCCN and an OCLC ARN.
- You **cannot export a new record** from the save file; you must add the record to the Authority Save File before you can export it.

**Save an authority record**

	Action
1	Retrieve an existing authority record in edit mode (local edit or master edit). Or Create a new record by deriving from an existing record, generating a record from a name heading, or by completing a blank name authority workform.
2	On the Action list, click <b>Save Record</b> . The system asks you to confirm the action and to select a workflow status.
3	Select a workflow status for the saved record. Open the status list and click the status you want to assign to this record. <b>Default workflow status:</b> In-process
4	Click <b>Yes</b> or press <Enter> to add the record to the save file. The system saves the record and displays a confirmation message and the save file number assigned to the record. The saved record appears in display mode. Or Click <b>No</b> to cancel saving the record. The system redisplay the record in the view you were using.  <b>Locked master record.</b> When you save a locked master record, the system places a long-term (90-day) lock on the master record in the Authority file and in the OCLC Authority File. Other users can retrieve a copy from the Authority file, but cannot change the master record.

**Statuses for saved authority records**

Users can assign Workflow statuses to a record when adding it to the save file or when resaving it after editing.

For example, to indicate that you have finished editing a record, you can change the record’s status to **Complete**.

Status	Meaning/purpose
New In Process In Review Complete	Workflow statuses users can assign to a record when adding it to the save file or when resaving it after editing. To change the status of multiple saved records, flag the records, retrieve flagged records, and use the <b>Set Status to</b> action.
Imported	The system assigns this status to imported authority records. Users cannot assign this status to a record.
Review Status Value: Submitted	Assigned when a record submitted for review. Lets reviewer retrieve records for review. Lets reviewee retrieve all submitted records. <b>Displayed In</b> Authority record retrieved from the review file. Brief entries in authority save file search results. Brief entries in review file results show owning and reviewing institutions. Search Save File screen, as a check box at the bottom of the search entry form. Show By Status screen, as a Review Status category and check box

**System-assigned save file record numbers**

- When anyone at your library saves an authority record, the system assigns it the first available authority save file record number, including any numbers vacated by deleted records. Therefore, save file records may be numbered out of sequence as you work with and save records.
- **Example:** You may have 50 records in the save file, but when you save the current record, it is not assigned the next sequential number, 51. Instead, it is assigned the first available number, 10, which was previously assigned to a record that is now deleted.

**Actions on saved authority records**

**Note: Actions on more than 100 records**

- **Export, save, delete, apply constant data, or change status.** Connexion can process more than 100 records for these actions. After processing 100 records, 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"> <li>1. Retrieve and flag saved records to which you want to apply default constant data.</li> <li>2. <b>(Optional)</b> To list flagged records not in the current results set, on the Authorities tab, under Show Options, click <b>Flagged SF Records</b>.</li> <li>3. On the save file results screen or on the Flagged SF Records screen, open the Action/Sort list and click <b>Apply Default CD to Flagged Records</b>.</li> </ol> <p>The system adds the default constant data.</p> <ul style="list-style-type: none"> <li>• <b>MARC constant data fields applied.</b> Depending on the option you select for <b>MARC Fields to Apply</b>, the system adds the entire record, the fixed field only, or the variable fields only.</li> </ul>
Change status on multiple saved records	<p>Retrieve and flag saved records for which you want to change the status.</p> <ul style="list-style-type: none"> <li>• On the results screen, open the Action/Sort list and click <b>Change Flagged Record Status</b>.</li> <li>• At the Set Status To screen, open the Set status to: list and click the appropriate status.</li> </ul>
Delete record from save file	<p>Retrieve a saved record you want to delete.</p> <ul style="list-style-type: none"> <li>• On the Action list, click <b>Delete Save File Record</b>. The system removes the record from the save file. The record remains in the Authority File. For a master record associated with the deleted save file record, the system releases the long-term lock (in the Authority File).</li> </ul> <p><b>Note:</b> The system deletes records from the Authority Save File as part of the Submit, Add, and Replace commands.</p>
Delete multiple saved records	<p>Retrieve and flag saved records you want to delete.</p> <ul style="list-style-type: none"> <li>• On the results screen, open the Action/Sort list and click <b>Delete Flagged Records</b>.</li> <li>• Click <b>OK</b> to confirm that you want to delete the flagged records.</li> </ul> <p>The system removes the flagged records from the save file. The records remain in the Authority File. The system releases the long-term locks (in the OCLC Authority File) on master records associated with the deleted save file records.</p>

Action	How to
Edit saved record	<p>Retrieve a saved record.</p> <ul style="list-style-type: none"> <li>• <b>Save file results list</b> Click the hyperlinked entry number of the record you want to edit.</li> <li>• <b>Locked record in display mode</b> On the Edit list, click <b>Edit Record</b>.</li> <li>• <b>Unlocked record in display mode</b> On the Action list, click <b>Lock Master Record</b> or on the Edit list, click <b>Edit Record</b>.</li> </ul>
Export saved record	<p>Retrieve a saved record that has an OCLC ARN and an LCCN number.</p> <ol style="list-style-type: none"> <li>1. On the Action list, click <b>Export Record</b>.</li> <li>2. At the Export Flagged Records screen, click <b>MARC</b>.</li> </ol>
Export multiple saved records	<p>Retrieve and flag a group of saved records that you want to export. The records must have an LCCN and an OCLC ARN.</p> <ol style="list-style-type: none"> <li>1. On the results screen, open the Action/Sort list and click <b>Export Flagged Records</b>.</li> <li>2. At the Export Flagged Records screen, click <b>MARC</b>.</li> </ol>
Resave record (with or without modifying)	<p>Retrieve a saved record.</p> <ul style="list-style-type: none"> <li>• On the Action list, click <b>Save Record</b>.</li> <li>• Change the status of the record as desired.</li> <li>• Click <b>Yes</b> to save the record.</li> </ul> <p>The system resets the 90-day expiration counter; if the master record is locked, the system extends the long-term lock in the OCLC Authority File.</p>
Resave (Reset Expiration) multiple saved records	<p>Retrieve and flag saved records you want to resave to reset the expiration dates.</p> <ul style="list-style-type: none"> <li>• On the results screen, open the Action/Sort list and click <b>Save Flagged Records</b>.</li> </ul> <p>The system changes the expiration date for each flagged record to 90 days For locked master records, the system extends the long-term lock in the OCLC Authority File.</p>

## 2 Search the Authority Save File

### Find all saved records

	Action
1	<p>On the Authorities tab, under Search Options, click <b>Save File</b>. Or Press &lt;Ctrl&gt;&lt;Shift&gt;&lt;O&gt;.</p> <p>The Search Authorities Save File screen appears.</p>
2	In the search form, leave all text boxes empty.
3	<p><b>(Optional) Show or hide cross references in results</b> Two check boxes below the search entry form let you specify which cross reference tracings, if any, appear in search results.</p> <ul style="list-style-type: none"> <li>To show <b>only</b> the main entry for each retrieved record, clear both check boxes.</li> <li>To show See reference tracings in addition to the main entry for each record, select the check box labeled <b>Show See References in Results</b>.</li> <li>To show See Also reference tracings for each main entry, select the check box labeled <b>Show See Also References in Results</b>.</li> <li>To include both See and See Also references for each main entry, select <b>both</b> check boxes.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>While viewing search results, you can use the Action/Sort list to show or hide See references and/or See Also references.</li> <li>Settings for these options are retained until you change them.</li> </ul>
4	Click <b>Search</b> or press <Enter>.

### Find saved records by status

### Search for records with a specific status

	Action
1	<p>On the Authorities tab, under Search Options, click <b>Save File</b>. Or Press &lt;Ctrl&gt;&lt;Shift&gt;&lt;O&gt;.</p> <p>The Search Authorities Save File screen appears.</p>
2	At the bottom of the search form, open the <b>with status</b> list and click the status category for which you want to retrieve saved records.

	Action
3	<p><b>Retrieve records submitted for review</b>                      Select the <b>Submitted for Review</b> check box to retrieve records submitted by your institution for review by other institutions.</p>
4	<p><b>(Optional) Show or hide cross references in results</b>                      Two check boxes below the search entry form let you specify which cross reference tracings, if any, appear in search results.</p> <ul style="list-style-type: none"> <li>To show <b>only</b> the main entry for each retrieved record, clear both check boxes.</li> <li>To show See reference tracings in addition to the main entry for each record, select the check box labeled <b>Show See References in Results</b>.</li> <li>To show See Also reference tracings for each main entry, select the check box labeled <b>Show See Also References in Results</b>.</li> <li>To include both See and See Also references for each main entry, select <b>both</b> check boxes.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>While viewing search results, you can use the Action/Sort list to show or hide See references and/or See Also references.</li> <li>Settings for these options are retained until you change them.</li> </ul>
5	<p>Check the status specification.</p> <p><b>Clear search</b></p> <ul style="list-style-type: none"> <li>To clear the specified status value, click <b>Clear Search</b>.</li> <li>Index lists retain the last index you selected.</li> <li>The operator list retains the last operator you selected.</li> <li>Check boxes below the search form retain their settings (selected or cleared).</li> </ul>
6	<p>Click <b>Search</b> or press &lt;Enter&gt;.                      The system displays brief entries for saved authority records with the specified status.</p> <p><b>Retain search</b></p> <ul style="list-style-type: none"> <li>To preserve the status value you specified, select the <b>Retain Search</b> check box.</li> <li>If <b>Retain Search</b> is not selected (the <b>default setting</b>), the system clears the 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.</li> </ul>

**Show records by status**

	Action
1	On the Authorities tab, under Show Options, click <b>By Status</b> .
2	At the status list screen, under Show Authority Save File, click the check box for the status(es) for which you want to retrieve saved records.
3	Click <b>Show Records</b> . The system displays brief entries for saved authority records with the specified status(es).

**Reviewer: View records for review**

	<b>Action</b>
1	On the Authorities tab, under Search Options, click <b>Save File</b> .
2	On the Search Save File screen, in the Review File area, type 1 or more OCLC institution symbol(s) in the text box. Or To retrieve all records available for your review, leave the text box empty.
3	<p>Click <b>Search</b> or press &lt;Enter&gt;.</p> <p><b>Result</b> The system retrieves all records available for review by the institutions whose symbols you specified. If you did not specify any institution symbols, the system retrieves records for which your institution is designated as a reviewer.</p> <p><b>Note:</b> Functions for reviewers</p> <p>Reviewers <b>can</b></p> <ul style="list-style-type: none"> <li>• View a submitted record in display mode (read only).</li> <li>• Change the record view by selecting from the View list.</li> </ul> <p>Reviewers <b>cannot</b></p> <ul style="list-style-type: none"> <li>• Edit records.</li> <li>• Flag records.</li> <li>• Take any other action.</li> </ul> <p><b>Note:</b> Reviewee can act on a record while a reviewer views the record</p> <ul style="list-style-type: none"> <li>• While you are reviewing a record, the reviewee (submitter) has full access to that record.</li> <li>• The <b>reviewee can recall a submitted record or delete it from the save file</b> at any time. Your view of the record remains open, but the recalled or deleted record is not retrieved when you re-search the Review File.</li> <li>• The <b>reviewee can edit the record</b> while you are viewing it. To view the revised record, return to the Review File results screen and reopen the record. You need not repeat the search.</li> </ul>

Find specific saved records

	Action
1	<p>On the Authorities tab, under Search Options, click <b>Save File</b>. Or Press &lt;Ctrl&gt;&lt;Shift&gt;&lt;O&gt;.</p> <p>The Search Authorities Save File screen appears.</p>
2	<p>Construct a search to specify the record(s) you want to retrieve.</p> <ul style="list-style-type: none"> <li>• <b>Type search term(s) in 1 or more boxes in the form.</b> 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>• <b>To search for 2 or more terms in the same index,</b> 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>• <b>To search for 2 terms in different indexes,</b> 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.</li> <li>• <b>To retrieve all saved records with a specific status,</b> open the <b>with status</b> 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.</li> </ul>
3	<p><b>Retrieve records submitted for review</b> Select the <b>Submitted for Review</b> check box to retrieve records submitted by your institution for review by other institutions.</p>
4	<p><b>(Optional) Show or hide cross references in results</b> Two check boxes below the search entry form let you specify which cross reference tracings, if any, appear in search results.</p> <ul style="list-style-type: none"> <li>• To show <b>only</b> the main entry for each retrieved record, clear both check boxes.</li> <li>• To show See reference tracings in addition to the main entry for each record, select the check box labeled <b>Show See References in Results</b>.</li> <li>• To show See Also reference tracings for each main entry, select the check box labeled <b>Show See Also References in Results</b>.</li> <li>• To include both See and See Also references for each main entry, select <b>both</b> check boxes.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• While viewing search results, you can use the Action/Sort list to show or hide See references and/or See Also references.</li> <li>• Settings for these options are retained until you change them.</li> </ul>

	Action
5	<p>Check the search form for errors in the terms, index selections, or operators.</p> <p><b>Clear search</b></p> <ul style="list-style-type: none"> <li>• To clear the text boxes and any specified status value, click <b>Clear Search</b>.</li> <li>• Index lists retain the last index you selected.</li> <li>• The operator list retains the last operator you selected.</li> <li>• Check boxes below the search form retain their settings (selected or cleared).</li> </ul>
6	<p>When finished constructing the search, click <b>Search</b> or press &lt;Enter&gt;.</p> <p><b>Retain Search</b></p> <ul style="list-style-type: none"> <li>• To preserve keywords you typed in the text boxes and any status value you specified, select the <b>Retain Search</b> check box.</li> <li>• If <b>Retain Search</b> is not selected (the <b>default setting</b>), 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.</li> </ul>

**Stopwords**

Omit the following words from a save file 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:** a an and are as at be by for from in is of on or that the to with http www

**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	<p>At the Search Authorities Save File screen,</p> <ul style="list-style-type: none"> <li>• Click <b>Search History</b> or press &lt;Alt&gt;&lt;=&gt;.</li> </ul>
List of previous searches	<p>For each listed search, the window shows</p> <ul style="list-style-type: none"> <li>• Search type: Authorities Save File.</li> <li>• Timestamp: date and time the search was performed.</li> <li>• Search criteria: all search elements, including terms, indexes, and specified status values.</li> </ul>
Repeat a previous search	<ul style="list-style-type: none"> <li>• Click <b>Repeat</b>.</li> </ul> <p>Connexion immediately performs the selected search.</p>

Search History function	How to use
Revise a previous search	<ul style="list-style-type: none"> <li>Click <b>Revise</b>. Results</li> <li>Connexion displays the Search Authorities Save File screen. The selected search is ready for revision.</li> </ul>
Clear search history	<ul style="list-style-type: none"> <li>Click <b>Clear History</b> (at the top of the Search History window).</li> </ul>
Close the Search History window	<ul style="list-style-type: none"> <li>Click <b>Close</b> (at the top of the Search History window).</li> </ul>

**Authority Save file indexes**

**Indexes for record content**

Index (label)	MARC fields indexed	MARC subfields indexed
LCCN (ln)	010	a z
LCSH (su)	See Subdivision heading	See Subdivision heading
OCLC ARN (an)	001	n/a
Personal Names (pn)	100 400 500	a b c d q
Corporate Names (co)	110	a b c d n
	151	If only a is present, then 151 is indexed as a Corporate Name. If any one of the following is present (v x y z), then 151 is not indexed as a Corporate Name.
	410	a b c d n
	451	If only a is present, then 451 is indexed as a Corporate Name. If any one of the following is present (v x y z), then 451 is not indexed as a Corporate Name.
	510	a b c d e n u
	551	If only a is present, then 551 is indexed as a Corporate Name. If any one of the following is present (v x y z), then 551 is not indexed as a Corporate Name
Conference Names (cn)	111 411 511	a c d e n q

<b>Index (label)</b>	<b>MARC fields indexed</b>	<b>MARC subfields indexed</b>
Title (ti)	100 110 111	k t g h m n o p r s
	130	a k g h m n o p r s
	400 410 411	a v x y z
	430 500 510 511 530	k t g h m n o p r s
Topicals (to)	150 450 550	all
Geographics (go)	151 451 551	all
Children's subject headings (sc)	See Subdivision heading	See Subdivision heading

Index (label)	MARC fields indexed	MARC subfields indexed
Reference (re) Note: 008/09 equals b or c	100 110 111 130 150 151 155 180 181 182 185 400 410 411 430 450 451 455 480 481 482 485 500 510 511 530 550 551 555 580 581 582 585	all

Index (label)	MARC fields indexed	MARC subfields indexed
Subdivision (sb)	100	all
LCSH (su)	110	
Note: All have LCCN starting with 'sh'	111	
Children's subject heading (sc)	130	
	150	
	151	
	180	
	181	
	182	
	185	
	400	
	410	
	411	
	430	
	450	
	451	
	480	
	481	
	482	
	485	
	500	
	510	
	511	
	530	
	550	
	551	
	580	
	581	
	582	
	585	

**Indexes for save file number, status, and replace date**

Index (label)	Definition	Format / example	Retrieves
Save File Number (sn) (Slot number)	Sequential number assigned when you saved the record. Appears in the <b>Save File #</b> field at the top of the record.	Type the number for the record you want. Save file numbers can be up to 4 digits, ranging from 1 to 9,999	Single saved record with this unique identifier.

Index (label)	Definition	Format / example	Retrieves
Status (cs:) Specified via <b>with status</b> list	Workflow status assigned to the record. <b>Available statuses:</b> New, In-process, In-review, Complete, Responded	Open the <b>with status</b> list at the bottom of the search form and click the name of the status you want. In record: <i>New</i> In search form: <b>new</b>	Saved records with the specified status (that meet any other criteria set in the search form). Users cannot assign the Responded status to a record. When you resave a responded record, you must change the status to one of the workflow statuses.
Replace Date (ud)	Date the record was last modified or resaved.	Type all 8 digits of the date, in order as in pathfinder: <i>yyyymmdd</i> . Omit hyphens or any other separators. To search for a range of dates, truncate by typing an asterisk (*) after the 4-digit year or after the year and month. <b>Examples:</b> In search form: <b>20020204</b> or <b>200202*</b>	Saved records last modified on the specified date.

**Search for LCCN (Library of Congress Control Number)**

- Select the LCCN index (index label: **In**).
- Always include the hyphen.

**Search for save file numbers (slot numbers)**

- The save file number appears in the record header in a full record.
- Save file number display: Save file numbers can be up to 6 digits. In brief entries and full records, save file numbers of 5 or fewer digits appear with 1 or more leading zeros.

<b>Action</b>
<b>Save file number search.</b> When searching the save file for a specific save file number, omit the leading zeros.

**Search for replace date**

- The replace date is the date on which the record was last modified or resaved.

<b>Action</b>
<b>Replace date search.</b> When searching, type all 8 digits of the date in the order they appear in the record: yyyyymmdd. Omit all hyphens or any other separators. Example: To search for records modified or resaved on December 10, 2002, type the following in the search box: <b>20021210</b>

**Include variant terms: truncation and wildcards**

Technique	How to
Search for the first part of a word; include variant word endings	Use <b>truncation</b> 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 (*). <b>Examples: librar*, comput*</b>
Include variant spellings	Use <b>character masking (wildcards)</b> 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 color or colour; <b>int?net</b> retrieves internet or intranet. Use the number sign to retrieve variants of exactly 1 character. <b>Example: wom#n</b> retrieves both woman and women.

**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 <b>and</b> .	<b>transportation safety gaudier and brzeska</b>
Multiple terms, at least one term required (OR)	[term1] or [term2]	<b>radiography or radiology</b>
One or more terms that must not be found (NOT)	[term1] [term2] not [term3] Or [term1] or [term2] not [term3]	<b>college education not elementary brzeska not gaudier</b>
One or more groups of terms combined with other terms (parentheses)	[term1] ([term2] or [term3]) [term1] or ([term2] or [term3]) [term1] or ([term2] [term3])	<b>clinical (trial* or research)</b>

## Use the Authority Save File

### 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	<b>food [Topical] and 20001205 [Replace Date]</b> <b>food [Topical] and Smith [Personal Name]</b>
OR	Records that contain at least 1 of the combined terms in the field(s) specified for that term; records can contain either term or both terms	<b>food [Topical] or 20001205 [Replace Date]</b> 20001205 [Replace Date] or Smith [Personal Name]
NOT	Records that do not contain the term that follows NOT in the field(s) specified.	<b>food [Topical] not 20001205 [Replace Date]</b> <b>brzeska not gaudier</b>

### Statuses for saved authority records

Users can assign Workflow statuses to a record when adding it to the save file or when resaving it after editing.

For example, to indicate that you have finished editing a record, you can change the record's status to **Complete**.

Status	Meaning/purpose
New In Process In Review Complete	Workflow statuses users can assign to a record when adding it to the save file or when resaving it after editing. To change the status of multiple saved records, flag the records, retrieve flagged records, and use the <b>Set Status to</b> action.
Imported	The system assigns this status to imported authority records. Users cannot assign this status to a record.
Review Status Value: Submitted	Assigned when a record submitted for review. Lets reviewer retrieve records for review. Lets reviewee retrieve all submitted records. <b>Displayed In</b> Authority record retrieved from the review file. Brief entries in authority save file search results. Brief entries in review file results show owning and reviewing institutions. Search Save File screen, as a check box at the bottom of the search entry form. Show By Status screen, as a Review Status category and check box

### 3 View and use AF save file search results

#### Results display

Number of Records Found	Results Display
No records 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 record found	The system displays the full record.
Up to 10 records	<ul style="list-style-type: none"> <li>• The results screen lists the headings of all retrieved records.</li> <li>• In each brief entry, the entry number is hyperlinked to the full record.</li> </ul>
11 or more records	<ul style="list-style-type: none"> <li>• The results screen lists headings for the first 10 retrieved records.</li> <li>• In each brief entry, the entry number is hyperlinked to the full record.</li> <li>• The <b>View List</b> 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 <b>View Record</b> box lets you type an entry number to view the full record.</li> </ul>

#### 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. Authority Save File searches retrieve records 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 pn=(wodehouse)
- Term groups (terms entered in the same box on the search form and searched in the same index). **Example:** sm:(OCL) and co:(council foreign relations)
- Boolean operators specified to combine terms entered in different boxes on the search form. **Example:** sm:(OCL) not cn:(airborne particulates)

Use this displayed query to

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

## Use the Authority Save File

### Sort save file results by date

	Action
1	Scroll to the top of the first screen of search results.
2	<p>On the Action/Sort list, click <b>Sort by Descending Date</b> or <b>Sort by Ascending Date</b>.</p> <p>The system sorts entries in the entire result set by the Modified date of the record (shown in brief entry).</p> <p><b>Ascending date sort:</b> Records with the earliest Modified date appear first.</p> <p><b>Descending date sort:</b> Records with the most recent Modified date appear first.</p>

### Sort save file results by main entry

	Action
1	Scroll to the top of the first screen of search results.
2	<p>On the Action/Sort list, click <b>Sort by Main Entry</b>.</p> <p>The system sorts entries in the entire results set alphabetically by main entry.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>The system sorts entries in the entire results set alphabetically by main entry.</li> <li>The alphabetical sort by main entry is the default sort for results.</li> </ul>

### Check expiration dates of saved records

Action
<p>In each brief entry, check the item Expires in __ days. The same information appears in the record header in a full record.</p> <p>The number of days (shown in red type) is updated daily. Records not modified or resaved are automatically deleted from the save file after 90 days.</p> <p><b>Restart aging (reset expiration date)</b></p> <p><b>Single record.</b> Retrieve the record from the save file and resave it.</p> <p><b>Multiple records.</b> Retrieve and flag records for which you want to reset expiration dates.</p> <p>Open the Action/Sort list and click <b>Save Flagged Records</b>.</p> <p>When you resave the record, the system resets the counter to 90 days.</p>

### Check save file numbers (slot numbers) of saved records

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><b>Save file number search:</b> You can search by save file number to retrieve a specific record.</p>

### Show or hide cross references in search results

- You can take these actions on retrieved records by using the Action/Sort list (top right corner of results screen).

- Cross references are displayed or hidden in search results based on how you set the **Show References in Results** check boxes on the Search Authorities Save File screen.

Action	Result
Hide See References (See references displayed)	Hide See reference tracings (4xx fields) for each main entry in the results list.
Hide See Also References (See Also references displayed)	Hide See Also reference tracings (5xx fields) for each main entry in the results list.
Show See References (See references hidden)	Show See reference tracings (4xx fields) for each main entry in the results list.
Show See Also References (See Also references hidden)	Show See Also reference tracings (5xx fields) for each main entry in the results list.

**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 <b>right arrow button</b> (right of <b>View List</b> box).
Move back 10 entries	Click the <b>left arrow button</b> (left of <b>View List</b> box).
View 10 entries beginning with specific entry	Type an entry number in the <b>View List</b> 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 <b>View Record</b> 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.

## Use the Authority Save File

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

### Edit record

Action
Click the hyperlinked entry number of the record you want to edit. The full record appears in an edit view. You are in <b>master edit</b> mode if the saved record is a copy of a locked master record. You are in <b>edit</b> mode if the saved record is a copy of an unlocked record.

### 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).

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

### Print screens of save file 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 record list.
3	In your browser, on the File menu, click <b>Print</b> or on the toolbar click the <b>Print</b> button.
4	In the Print dialog box, click <b>OK</b> or press <Enter>.

**Flag saved records**

Single records	All on a page	Result set
Click the <b>open box</b> in front of the record you want to flag.	On the Action/Sort list, click <b>Flag All on Page</b> .	On the Action/Sort list, click <b>Flag All Records Retrieved</b> .
A check mark appears in front of each brief entry you have flagged.		

**Unflag saved records**

Single records	All on a page	Result set
Click the <b>check mark</b> in front of the record you want to unflag.	On the Action/Sort list, click <b>Clear Flags on Page</b> .	On the Action/Sort list, click <b>Clear All Flags</b> .
A open box appears in front of each unflagged brief entry.		

**Actions on flagged records**

**Note: Actions on more than 100 records**

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

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 record list.
Clear Flags on Page	Check marks disappear from all entries on this page of the record list.
Clear All Flags	Check marks are removed from entries on all pages of the record list.
Apply Default CD to Flagged Records	The system adds your default constant data to all flagged records. Applies whole record, fixed field only, or variable fields only, depending on the MARC Fields to Apply setting in your default constant data record.
Export multiple saved records	Retrieve and flag a group of saved records that you want to export. The records must have an LCCN and an OCLC ARN. 1. On the results screen, open the Action/Sort list and click <b>Export Flagged Records</b> . 2. At the Export Flagged Records screen, click <b>MARC</b> . <b>Note:</b> You can export saved records <b>only</b> if the records exist in the Authority File (they have LCCNs and ARNs). You cannot export a new record not yet added to the Authority File.
Change Flagged Record Status	<b>Change status of flagged records</b> At the Set Status To screen, open the <b>Set status to:</b> list and click the appropriate status. Available statuses: New, In Process, In Review, Complete.

On the Action/ Sort list, click	Result or next step
Save Flagged Records (Reset expiration dates)	Reset expiration periods of flagged authority records. Click <b>OK</b> to confirm that you want to save (reset expiration dates) for the records. The system changes the expiration date for each flagged record to 90 days.
Delete Flagged Records	Click <b>OK</b> to confirm that you want to delete the records. The system removes the flagged records from the AF save file. The records remain in the Authority File. The system releases the long-term locks (in the Authority File) on master records associated with the deleted save file records.

**Actions on saved authority records**

**Note: Actions on more than 100 records**

- **Export, save, delete, apply constant data, or change status.** Connexion can process more than 100 records for these actions. After processing 100 records, 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"> <li>1. Retrieve and flag saved records to which you want to apply default constant data.</li> <li>2. <b>(Optional)</b> To list flagged records not in the current results set, on the Authorities tab, under Show Options, click <b>Flagged SF Records</b>.</li> <li>3. On the save file results screen or on the Flagged SF Records screen, open the Action/Sort list and click <b>Apply Default CD to Flagged Records</b>.</li> </ol> <p>The system adds the default constant data.</p> <ul style="list-style-type: none"> <li>• <b>MARC constant data fields applied.</b> Depending on the option you select for <b>MARC Fields to Apply</b>, the system adds the entire record, the fixed field only, or the variable fields only.</li> </ul>
Change status on multiple saved records	<p>Retrieve and flag saved records for which you want to change the status.</p> <ul style="list-style-type: none"> <li>• On the results screen, open the Action/Sort list and click <b>Change Flagged Record Status</b>.</li> <li>• At the Set Status To screen, open the Set status to: list and click the appropriate status.</li> </ul>
Delete record from save file	<p>Retrieve a saved record you want to delete.</p> <ul style="list-style-type: none"> <li>• On the Action list, click <b>Delete Save File Record</b>. The system removes the record from the authority save file. The record remains in the Authority File. For a master record associated with the deleted save file record, The system releases the long-term lock (in the Authority File).</li> </ul> <p><b>Note:</b> The system deletes records from the authority save file as part of the Add, and Replace commands.</p>

Action	How to
Delete multiple saved records	<p>Retrieve and flag saved records you want to delete.</p> <ul style="list-style-type: none"> <li>On the results screen, open the Action/Sort list and click <b>Delete Flagged Records</b>.</li> <li>Click <b>OK</b> to confirm that you want to delete the flagged records.</li> </ul> <p>The system removes the flagged records from the authority save file. The records remain in the Authority File. The system releases the long-term locks (in the Authority File) on master records associated with the deleted save file records.</p>
Edit saved record	<p>Retrieve a saved record.</p> <ul style="list-style-type: none"> <li><b>Save file results list</b> Click the hyperlinked entry number of the record you want to edit.</li> <li><b>Locked record in display mode</b> On the Edit list, click <b>Edit Record</b>.</li> <li><b>Unlocked record in display mode</b> On the Action list, click <b>Lock Master Record</b> or on the Edit list, click <b>Edit Record</b>.</li> </ul>
Export saved record	<p>Retrieve a saved record that has an OCLC ARN and an LCCN number.</p> <ol style="list-style-type: none"> <li>On the Action list, click <b>Export Record</b>.</li> <li>At the Export Flagged Records screen, click <b>MARC</b>.</li> </ol>
Export multiple saved records	<p>Retrieve and flag a group of saved records that you want to export. The records must have an LCCN and an OCLC ARN.</p> <ol style="list-style-type: none"> <li>On the results screen, open the Action/Sort list and click <b>Export Flagged Records</b>.</li> <li>At the Export Flagged Records screen, click <b>MARC</b>.</li> </ol>
Resave record (with or without modifying)	<p>Retrieve a saved record.</p> <ul style="list-style-type: none"> <li>On the Action list, click <b>Save Record</b>.</li> <li>Change the status of the record as desired.</li> <li>Click <b>Yes</b> to save the record.</li> </ul> <p>The system resets the 90-day expiration counter; if the master record is locked, the system extends the long-term lock in the Authority File.</p>
Resave (Reset Expiration) multiple saved records	<p>Retrieve and flag saved records you want to resave to reset the expiration dates.</p> <ul style="list-style-type: none"> <li>On the results screen, open the Action/Sort list and click <b>Save Flagged Records</b>.</li> </ul> <p>The system changes the expiration date for each flagged record to 90 days For locked master records, the system extends the long-term lock in the Authority File.</p>

## 4 Show Flagged AF Save File screen

### Use Flagged AF Save File screen

- Review a list of brief entries for records in the Authority save file flagged during the current session.
- Clear flags from all or selected records.
- Set a status for the flagged records.
- Reset the expiration period (Save Flagged Records) for the flagged records.
- Delete flagged records from the authority save file.
- Export the flagged records. You can export saved records **only** if the records exist in the Authority File (they have LCCNs and ARNs). You cannot export a new record not yet added to the Authority File.
- View a full record.
- Edit a record.

### Actions on list of flagged records

#### Note: Actions on more than 100 records

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

<b>Action</b>
Open the Action/Sort list (top right). Click the action you want to take on the flagged records.

<b>On the Action/Sort list, click</b>	<b>Result or next step</b>
Flag All on Page	A check mark appears in the box to the left of each entry on this page of the record list.
Clear Flags on Page	Check marks disappear from all entries on this page of the record list.
Clear All Flags	Check marks are removed from entries on all pages of the record list.
Apply Default CD to Flagged Records	The system adds your default constant data to all flagged records. Applies whole record, fixed field only, or variable fields only, depending on the MARC Fields to Apply setting in your default constant data record.

On the Action/ Sort list, click	Result or next step
Export multiple saved records	Retrieve and flag a group of saved records that you want to export. The records must have an LCCN and an OCLC ARN. 1. On the results screen, open the Action/Sort list and click <b>Export Flagged Records</b> . 2. At the Export Flagged Records screen, click <b>MARC</b> . <b>Note:</b> You can export saved records <b>only</b> if the records exist in the Authority File (they have LCCNs and ARNs). You cannot export a new record not yet added to the Authority File.
Change Flagged Record Status	<b>Change status of flagged records</b> At the Set Status To screen, open the <b>Set status to:</b> list and click the appropriate status. Available statuses: New, In Process, In Review, Complete.
Save Flagged Records	Reset expiration periods of flagged authority records. Click <b>OK</b> to confirm that you want to reset expiration dates for the records. The system changes the expiration date for each flagged record to 90 days.
Delete Flagged Records	Click <b>OK</b> to confirm that you want to delete the records. The system removes the flagged records from the AF save file. The records remain in the Authority File. The system releases the long-term locks (in the AF and OCLC Cataloging) on master records associated with the deleted save file records.
Move forward 10 entries	Click the <b>right arrow button</b> (right of <b>View List</b> box).
Move back 10 entries	Click the <b>left arrow button</b> (left of <b>View List</b> box).
View 10 entries beginning with specific entry	Type an entry number in the <b>View List</b> 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 <b>View Record</b> 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 <b>Print</b> . Or On the toolbar click the <b>Print</b> button.

**Actions on brief entry**

Action	How to
View full authority record	Click the <b>Display</b> button next to the heading in the brief entry.

## Use the Authority Save File

Action	How to
Begin editing saved authority record	Click the hyperlinked entry number for the brief entry. The edit mode for a saved record is established when the record is placed in the save file. Saved records may be master versions of existing records locked in the Authority File (saved while Editing Master Record), or local versions of existing records not locked in the Authority File (saved while Editing Authority Record), or new records not yet added to the Authority File.
Unflag record	Click the check mark to the left of the brief entry. The check mark changes to an open box.
Flag record	Click the open box to the left of the brief entry. The open box changes to a check mark.

### 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).

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

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

### No flagged records in the Authority save file

If you have not flagged records in the Authority save file during the current session, the system displays the message

You currently have no Flagged Records

If you flagged records and then exited the system or closed your browser without exiting the system properly, the system unflagged the records when your session ended. You must reflag the records to work with them in your current session.

## 5 Status list screen: authority records

### Save file status list for your library

- Statistics for authority records your library placed in the Authority save file appear in the **Show Save File** area of the screen.
- Statistics include new records awaiting completion and existing authority records being modified.
- The list shows total saved records in each workflow status category.
- In the Review Status category, select the Submitted check box to retrieve authority records submitted by your institution for review by other institutions. Select this

### Actions on status list

To	Do this
List authority records in workflow status categories)	Under <b>Show Authority Save File</b> , click the check box next to each status category to include in the list. Click <b>Show Records</b> .

### Statuses for saved authority records

Status	Meaning/purpose
New In Process In Review Complete	Workflow statuses users can assign to a record when adding it to the save file or when resaving it after editing. To change the status of multiple saved records, flag the records, retrieve flagged records, and use the <b>Set Status to</b> action.
Imported	The system assigns this status to imported authority records. Users cannot assign this status to a record.
Review Status Value: Submitted	Assigned when a record submitted for review. Lets reviewer retrieve records for review. Lets reviewee retrieve all submitted records. <b>Displayed In</b> Authority record retrieved from the review file. Brief entries in authority save file search results. Brief entries in review file results show owning and reviewing institutions. Search Save File screen, as a check box at the bottom of the search entry form. Show By Status screen, as a Review Status category and check box

## 6 Set status for multiple saved authority records

### About the Set Status screen

- The system displays this screen when you flag saved authority records and take the **Change Flagged Record Status** action (available on the save file results screen or the Show Flagged SF Records screen).
- When you select a status, the system assigns that status to the saved authority records.
- Changing the status of multiple saved records does **not** reset the expiration date for the records. To reset the expiration counter, retrieve the record from the save file and save it again. Or flag record(s) you want to resave and then take the **Save Flagged Records** action. Resaving a master record also extends the long-term lock on the record in the Authority File.
- **More than 100 records.** After changing status for the first 100 flagged records, the system asks you to confirm that you want to continue.

### Use this screen

Action	How to
Set status for multiple saved records	Open the list labeled <b>Set status to</b> and click the status you want to assign to the authority records.

### Statuses for saved authority records

Users can assign Workflow statuses to a record when adding it to the save file or when resaving it after editing.

For example, to indicate that you have finished editing a record, you can change the record's status to **Complete**.

Status	Meaning/purpose
New In Process In Review Complete	Workflow statuses users can assign to a record when adding it to the save file or when resaving it after editing. To change the status of multiple saved records, flag the records, retrieve flagged records, and use the <b>Set Status to</b> action.
Imported	The system assigns this status to imported authority records. Users cannot assign this status to a record.
Review Status Value: Submitted	Assigned when a record submitted for review. Lets reviewer retrieve records for review. Lets reviewee retrieve all submitted records. <b>Displayed In</b> Authority record retrieved from the review file. Brief entries in authority save file search results. Brief entries in review file results show owning and reviewing institutions. Search Save File screen, as a check box at the bottom of the search entry form. Show By Status screen, as a Review Status category and check box