Connexion Client Authorities Quick Reference

Introduction

This Quick Reference provides brief instructions for:

- Controlling headings in bibliographic records.
- Creating, editing, saving, exporting, and importing authority records.
- Batch-processing searches and actions on authority records.
- **For NACO* authorized catalogers only:** Adding new records to the LC Names and Subjects authority file and replacing master authority records.

  Note: Non-NACO libraries logged on with at least a Full level cataloging authorization can replace records to retain controlled headings.

  *NACO = Name Authority Cooperative program. See a quick reference, **Cataloging Authorization Levels for Record Actions and Upgrades**, for details.

This quick reference **does not cover** instructions already available in:

- **Connexion: Searching Authorities Quick Reference**
- **Connexion Client Setup Worksheet**

Note on multiscript support for non-Latin script variant headings: The following non-Latin scripts are supported for adding variant name headings and notes in authority records: Arabic, Chinese, Cyrillic, Greek, Hebrew, Japanese, and Korean. See more on p. 3.

Menu commands and selected default keystroke shortcuts and toolbar buttons

The following list of default function keystroke shortcuts for menu commands shows corresponding buttons if they are on the default toolbar.

You can assign your own keystroke shortcuts in **Tools > Keymaps**.

You can add or remove toolbar buttons using drag and drop in **Tools > Toolbar Editor**.

Client menu > command	Keystroke	Toolbar button
Authorities > Search > LC Names and Subjects	<Shift><F2>	
Authorities > Search > Online Save File	<Alt><F3>	
Authorities > Search > Local Save File	<Shift><F3>	---
Authorities > Browse > LC Names and Subjects	<Alt><F2>	
Edit > Validate	<Shift><F5>	
Edit > Control Headings > All	<Shift><F11)	---
***Edit > Control Headings > Single	<F11>	
***Edit > Control Headings > Uncontrol Single	<Ctrl><F11>	---
***Edit > Cut Copy Paste > Cut	<Ctrl><X>	
***Edit > Cut Copy Paste > Copy	<Ctrl><C>	
***Edit > Cut Copy Paste > Paste	<Ctrl><V>	
Edit > Find/Replace	<Ctrl><F>	
Edit > Enter Diacritics	<Ctrl><E>	
Edit > Reformat	<Ctrl><R>	
Action > Lock Master Record	<Alt><F8>	---
Action > Release Record Lock	<Alt><F9>	---
Action > Replace Record	<Alt><F10>	---
Action > Save Record to Online File	<Ctrl><Alt><V>	---
Action > Save Record to Local File	<F4>	---
Action > Delete Record	<Ctrl><Alt><D>	
Action > Export	<F5>	
View > Navigate Records and Lists > Back	<Shift><F9>	
View > Navigate Records and Lists > Forward	<F9>	
View > Pinned	<Shift><F4>	---
Tools > Check Spelling	<F7>	---
Help > Client Help	<F1>	
***Help > MARC Field Help	<Ctrl><F1>	

***Note: Commands marked with asterisks are also available on a right-click pop-up menu. To access the menu, right-click in the displayed record, and on the pop-up menu, click a command.

> **Example:** Right-click, and on the pop-up menu, click **Copy Control Number** to copy the ARN without having to select it.

Control headings in bibliographic records

- When you control a heading in a bibliographic record, the system retrieves a matching authority record and inserts the heading into the bibliographic record as a hyperlink.

- The system uses the link to maintain future changes. If the heading changes in the authority record, the bibliographic record is automatically updated. To denote that the system automatically updated heading(s) in a record, the system adds the text *OCLCA* in field 040 ǂd

Control a single heading

	Action
1	Log on and open a bibliographic record or create one.
2	With the cursor in a heading field, click **Edit > Control Headings > Single** (or use ▣ or <F11>). (This command is also available on the right-click pop-up menu.) **Result:** The system searches the LC authority file and does the following, depending on what is found: - **If an exact match is found** to a single authority record or to multiple authority records and if the original heading requires no changes in the tag or text: The heading is automatically controlled, inserted into the bibliographic record and hyperlinked to the authority record(s). Go to step 4. - **If an unqualified personal name, no exact match, or no matches are found**, the system opens the Control Headings window with a list of candidate headings to help you select or build a controlled heading manually. Go to step 3.
3	If the Control Headings window opens, you can: - View any proposed authority heading in the list: Click the heading link. - Select a candidate heading and insert as is: Click **Insert Heading** next to the heading you want to use. (The window closes and you are returned to the bibliographic record.) - Look for a better match: In the **New Query** box, edit the existing text or enter new text, and then click **Match Best**. - Add a subfield to a heading in the list: Click **Modify Heading** to begin. When finished, click **Insert Heading**, or click **Cancel** to cancel controlling the heading manually. You are returned to the bibliographic record.

4	To retain controlled headings, you must either:
	Add a new record to WorldCat:
	
	    Click **Holdings > Update Holdings** [or **Produce and Update Holdings** or **Alternate Produce and Update**].
	Or
	Replace the master record in WorldCat:
	
	    Click **Action > Replace Record** [or **Replace and Update Holdings**].
	
	Requirement: You must be logged on with at least a Full-level cataloging authorization to add or replace records in WorldCat.

Control all headings

	Action
1	Log on and open a bibliographic record or create one.
2	Click **Edit > Control Headings > All** (or press <Shift><F11>). **Results:** The system opens a message about the outcome. - The system replaces controllable fields with controlled fields automatically if exact matches are found. - If not all headings are controlled, you can try to control each remaining heading one at a time manually.
3	To retain controlled headings, you must add or replace a record in WorldCat. (See step 4 of the instructions for single heading control.)

Controllable fields

1. 100, 110, 111, 130
2. 600, 610, 611, 630, 650, 651, with second indicator 0
3. 655, with second indicator 7 and ǂ2 *lcgft*
4. 700, 710, 711, 730
- 800, 810, 811, 830

Uncontrol headings

You must uncontrol a heading to edit the text. Uncontrol heading(s) by removing the link:

Action

Uncontrol a single controlled heading:
 	
    With the cursor in the tag or indicator cell of the field you want to uncontrol, click **Edit > Uncontrol Single** (or press <Ctrl><F11>). (This command is also available on the right-click pop-up menu.)
Or
Uncontrol all controlled headings:
 	
    Click **Edit > Uncontrol All** (or press <Alt><E><H><N>).

About adding or replacing records to preserve controlled headings

If you have a Full-level or higher cataloging authorization, you can add or replace records to retain controlled headings. As a result of the successful Expert Community project, you can make additions and changes, including controlling headings, to almost all fields in most records, with a few exceptions. See more information on the **Expert Community project** Web page.

Note: With a less than Full-level authorization, although you cannot add or replace a record, you can save the record for review and later completion under a higher authorization.

Edit authority records

About record limits:
— No limits on the number of variable fields or total record length.
— Theoretical limit on the number of characters: Up to 99,999.

Tools for navigating and editing

Click this…	To do this…
Edit > Reformat (<Ctrl><R>)	Restore MARC tag order in records.
Tools > Check Spelling (<F7>)	Check spelling in a record.
View > Navigate Records and Lists > Forward (🖳 or <F9>) Or **View > Navigate Records and Lists > Back** (🖳 or <Shift><F9>)	With a record open from a list, move to the next or previous record in the list without having to re-display it.
View > OCLC Fixed Field > Top (**default**) [or **> Bottom** or **> As Variable Field**]	Change the way the fixed field displays. **Note: Top** or **Bottom** displays specific fixed field elements.
View > Pinned (or press <Shift><F4>)	"Pin" a displayed record open before opening another of the same type. (Records of different types, such as LC authority file records vs. save file records, stay open simultaneously.)

Tips for using lists

- **Re-size columns:** Click, hold, and drag the vertical corner of a column.
- **Re-sort a list:** Click a column heading to sort the list by the data in that column.
- **Use a right-click shortcut menu:** Right-click anywhere in a list and then:
  - Click **Copy** to copy selected entries in a list
  - Click **Select All** to select all entries in a list
  - Click **List Settings** to customize the list display: Show or hide columns, move columns to re-order the list, or reset to the default display.
  - Click **Reset List Size** to restore columns to default size.

Open MARC field descriptions

To open MARC Field Help for a specific field or fixed field element:

Action
Place the cursor in a variable field or a fixed field data element, and click **Help > MARC Field Help** (or use 🖲 or <Ctrl><F1>). The description of the field opens in **Authorities: Formats and Indexes**. **Note:** This command is also on the right-click menu.

Open RDA Toolkit field descriptions

You must be a subscriber to RDA Toolkit and enter your subscriber user name and password in **Tools > Options > RDA Toolkit**. See the **RDA Toolkit Web site** for more information.

Action
Place the cursor in a variable field and click **Tools > RDA Toolkit**. **Note:** This command is also on the right-click menu.

Insert diacritics

Enter Latin script diacritics and special characters that are included in a standard set of valid characters adopted by the American Library Association (ALA):

	Action
1	In a record: Place the cursor where you want to insert, and click **Edit > Enter Diacritics** (or click 🄰🄻🄰 or press <Ctrl><E>). Or In a search term or a "find" or "replace" term: Click **Enter Diacritics** in a Search, Browse, or Find/Replace window.
2	In the Enter Diacritics and Special Characters window, select a character from the chart of images or from the list of names, and then click **Insert** or **Insert and Close**.

Notes:

5. Insert a diacritic after the letter it modifies.
6. Optionally, use default assigned keystrokes to insert characters. Click **View > Assigned Keys** for a complete list.

Insert MARC-8 non-Latin script variant headings

For NACO contribution and distribution, the client supports the following MARC-8 character sets for adding variant name headings to fields 4xx and 7xx and to various note fields (for example, 67x):

Arabic (including Persian), Chinese, Cyrillic, Greek, Hebrew (including Yiddish), Japanese, and Korean

To enter scripts in the client, install languages and keyboards using your version of Windows. In the browser, copy and paste scripts from other software programs or use the Windows Character Map utility. See **client** or **browser** documentation or see Windows Help for details.

See general information in **Use Non-Latin Scripts for Cataloging**.

Create and use constant data

Create MARC-formatted constant data records to add standard content repeatedly to authority records without having to re-key:

	Action
1	Create a constant data record: Click **Authorities > Create > Constant Data** (<Ctrl><Shift><Q>) and select a blank record or a MARC format.
2	Add or edit data and save the new constant data record: Click **Action > Save Record to Online File** (<Ctrl><Alt><V>) (must be logged on), or click **Save Record to Local File** (<F4>), and then: • **Required.** Assign a name to the constant data record. • **Optional.** Click the check box to set the new constant data record as the default, if you use it exclusively or most often. • **Optional.** Add a free-text My Status to help retrieve the record (see Tip in "Save records" below for instructions).
3	In the Fields to Apply window, click a button to determine which fields in the constant data record to apply: **Fixed**, **Variable**, or **Both**.

To apply default constant data:

Action
With an authority record open, click **Edit > Constant Data > Online > Apply Default** (or press <Ctrl><A>) (must be logged on), or click **Edit > Constant Data > Local > Apply Default** (or press <Ctrl><Y>).

Create and use text strings

Text strings supplement constant data for entering frequently used data that is short anywhere in a record. To create a text string:

	Action
1	Click **Tools > Text Strings** or click the name of the text strings quick tool on the toolbar, [Text Strings ▾], or click the arrow in the quick tool and then click **Manage** to open the Text Strings window.
2	In the Text Strings window, click **Add**.
3	Enter a unique name in the **Description** box.
4	Enter the text string you want to insert in the **Text** box. Text can be: • A data cell in a field • A field (omit spaces between tag, indicators, and field data) • Multiple fields (enter each field on a separate line)
5	Click **OK** to save the text string.

To insert a text string:

Action
Place the cursor where you want to insert text, and then: Click **Tools > Text Strings**. Select a text string and click **Apply**. The client inserts it. Click **Close** to close the Text Strings window. Or Click the arrow in the text strings quick tool—[Text Strings ▾]. In the list, click a text string name. The client inserts it.

Validate records

Automatic validation. Taking a final action on a record interactively or via batch automatically validates the record, **except**, by default, when you export records. To change validation for exported records:

	Action
1	Click **Tools > Options > General**. Then click **Validation Level Options**.
2	In the **Export Authority Record** list, select one of the following: • **None** (**default**) (no validation for export) • **Full** (basic validation and verifies relationships among elements) • **Basic** (verifies MARC record structure, including elements, length, repeatability, type of data and codes)

Separate validation. To validate records before taking actions:

Action
With an LC authority file record or local or online save file record open, or with records selected in a list of local or online save file records, while logged on or offline: Click **Edit > Validate** (or click [icon] or press <Shift><F5>).

Save records

Save authority records

Online save file=a single OCLC online file shared by staff at your library who log on using the same OCLC symbol.

Local save file=one or more files on your workstation or shared drive.

Action
Display a record or select records in a list, and click **Action > Save Record to Online File** (or press <Ctrl><Alt><V>) (must be logged on), or click **Action > Save Record to Local File** (or press <F4>) (logged on or offline). **Notes on results:** • Records saved to the online file expire and are deleted from the save file after 90 days, unless you modify or resave them. • **Note:** Locked master records are unlocked when they expire. • Records saved to the local file do not expire. • Re-save an online save file record after taking a final OCLC action if you want to keep it in the online save file. • The client automatically saves local save file records after actions. • The maximum number of records for both local and online save files is 9,999.

Tip: Add My Status to saved records

Assign a free-text My Status to help retrieve a related group of records from the online or local save file or from constant data files.

	Action
1	Display a record or select records in a list, and click **Action > Set Status** (or press <Alt><Shift><S>). Or Set a default My Status in **Tools > Options > My Status** to add the My Status automatically whenever you save a record.
2	Enter a My Status using up to 40 characters of free text. For example, type your name, a date, or a project name.
3	Click **OK** or press <Enter>.

Delete records from the save file

Action
Display a save file record or select records in a list, and click **Action > Delete Record** (or click [icon] or press <Ctrl><Alt><D>).

Search for specific save file records

	Action
1	Click **Authorities > Search > Online Save File** (or click [icon] or press <Alt><F3>) (must log on), or click **Authorities > Search > Local Save File** (or press <Shift><F3>).
2	Enter one or more search terms in a **Search for** box, select an index for each and, if multiple terms, select a Boolean operator to combine.
3	Limit the search by statuses or other criteria.
4	Click **OK** or press <Enter>.

Find save file records by statuses or by limits only

	Action
1	Click **Authorities > Show > By Online Save File Status** (or press <Ctrl><O>) (must be logged on), or click **Authorities > Show By Local Save File Status** (or press <Alt><C><H><L>).
2	Select status or limit check boxes.
3	Click **Show Records** or press <Enter>.

Tip: Quick way to retrieve save file records

Retrieve all records in the save file and then sort by data in a column:

	Action
1	Click **Authorities > Search > Online Save File** or **Local Save File**.
2	Do not enter any search terms or criteria. Click **OK.**
3	Sort the results list by clicking a column heading to group the records you need together. For example, sort by My Status or by action status.
4	Click **OK** or press <Enter>.

See **lists of indexes** for searching the online and local save files.

Use local files

When you install the Connexion client, you also install default (empty) local files on your workstation for authority records and constant data.

- DefaultAuth.auth.db
- DefaultAuthCD.authcd.db
- Default file location: X:\Documents and Settings\[user name]\ Application Data\OCLC\Connex\Db (X = letter of your hard drive)
- Limitation for each local file: 9,999 records

Use the local file manager to work with more local files:

	Action
1	Click **File > Local File Manager** (or press <Alt><F><L><F>).
2	Under **Choose File Type**, click a button next to the type of local file you want to work with. A check mark designates the default file.
3	Click one of the following buttons, depending on what you want to do: ● **Configure Paths** to create or delete a local file path name. ● **Auto Back Up** to clear or select automatic back up and a location. ● **Create** to create a new file (type the file name only; the client supplies the correct file extension). ● **Delete** to delete the selected file (you cannot delete the default file). ● **Set as Default** to set the selected file as the default. ● **Authorization** to assign a logon authorization and password to use for logon whenever you use the selected file. ● **Statistics** to show the number of records in the file by specific record statuses. ● **Compact/Repair** to remove empty space remaining when records are deleted from the selected file or to repair the selected file when you receive erroneous messages that records are in use by another.

Take final actions on authority records

Taking actions interactively. The following sections cover taking a specific action on records interactively (that is, immediately, while logged on.

Taking actions via batch processing . For instructions on batch processing record actions in the client, see **Batch process LC authority file searches and record actions** below.

Authorization. The final actions you can take on records depend on the cataloging level associated with your logon authorization. See **Cataloging Authorizations Levels for Record Actions and Upgrades** for more information.

Export records

- Exporting records requires no minimum authorization level.
- Before you export the first time, you must create an export destination. See client Help or **Setup Worksheet** for export setup and options.
- You can export both existing authority records (records that have ARNs) and workforms (new records not yet added).

To export records:

Action
Display a record or select records in a list, and click **Action > Export** (or click or press <F5>).
Caution: If exporting to an existing file, the first time you export, the client may prompt you to choose to overwrite or append data already in the file or to cancel and use another file. Your choice persists each time you export within the same logon session until you close and re-open the client.

Result of exporting: Records export immediately, whether you are logged on or offline, unless you set an option to export in batch in **Tools > Options > Batch**.

Tip: Check the **Export** status in the status bar of a record or in the **Export** column of a list. If it is **R** (Ready), your option is set for batch export.

Report errors in records

Reporting errors in records requires a minimum authorization of Limited.

	Action
1	With a record displayed, click **Action > Report Error** (or press <Alt><A><E>).
2	Complete required fields: Enter your OCLC symbol, user name, e-mail.
3	**Optional.** Select a check box to receive a copy of your report.
4	In the large text box, describe the error.
5	Click **Report Error**. The client automatically attaches a copy of the record to the report and sends the report to OCLC quality control staff.

Create records and add to the LC authority file

About record limits:
– No limits on the number of variable fields or total record length.
– Theoretical limit on the number of characters: Up to 99,999.

- No minimum authorization is required to create name authority records.
- Adding new records to the LC authority file requires a NACO authorization or higher.
- Always search the LC authority file before creating a new record and again before adding it to prevent duplicate records.
- **Required.** If you use a NACO authorization, before creating or importing records offline, you must enter your MARC organization code in **Tools > Options > General, Offline Cataloging Options**.

You can create a record from a workform, derive a new record from an existing record, generate a new record from a name heading in a bibliographic record, or import records from your local system.

Create a record from a workform (MARC template)

	Action
1	Logged on or offline, click **Authorities > Create > Single Record > Blank Record** (or press <Ctrl><Shift><K>). Or Click **Authorities > Create > Single Record** and then click one of the following MARC formats: Conference Name, Corporate Name, Geographics, Personal Name, Series, or Uniform Title
2	Add or edit data to complete the record.
3	Add the record to the LC authority file (requires a NACO authorization): Click **Action > Add to Authority File** (or press <Ctrl><Alt><A>).

Derive a new record from an existing record

	Action
1	Retrieve an LC authority record that closely matches, or is related to, the item you are cataloging.
2	Click **Edit > Derive > New Record** (or press <Ctrl><Alt><C>).
3	Add or edit data to complete the record, and then add to the LC authority file (see step 3 in the procedure above for using a workform).

Generate a new record from a name heading

	Action
1	Retrieve a bibliographic record with a heading you want to use.
2	Click **Macros > Manage** (or press <Ctrl><Alt><Shift><G>).
3	In the Macros list, click the plus sign (**+**) next to the macro book **OCLC** to expand the contents of the book.
4	Select **GenerateAuthorityRecord**, and then click **Run**.
5	Add or edit data to complete the record, and then add to the LC authority file (see step 3 in the procedure above for using a workform).

Import records

Create records in your local system and import them into Connexion as workforms.

	Action
1	Offline or logged on, click **File > Import Records** (<Alt><F><I>).
2	Type the full path and file name of your import file, or click **Browse** to navigate to the file. **Required.** Files must be MARC-compatible files (for example, files with the extension ***.dat**.
3	Select **Import to Online Save File** (must log on) or **Import to Local File**.
4	**Optional.** Click **Options** to select a check box to apply default constant data or assign a My Status, or click **Record Characteristics** to select a character set for imported records.
6	Click **OK** or press <Enter>.
7	Click **Yes** to delete the original file or **No** to keep it.
8	A temporary Import Report displays. Print or copy the report before closing it, if needed.

Replace master records

Replacing records in the LC authority file requires a NACO authorization or higher.

	Action
1	Log on and retrieve the record you want to modify (**Authorities > Search > LC Names and Subjects**).
2	**Optional.** Click **Action > Lock Master Record** (<Alt><F8>).
3	Add or edit data in the record.
4	Click **Action > Replace Record** (<Alt><F10>). **Notes:** - The system locks the record automatically before replacing, if you skip step 2, and then unlocks it when the action is completed. - If the record replaced is in the online save file, the system automatically deletes it unless you re-save before you close it.

Batch process searches and actions

Enter LC authority file searches and/or mark records for actions in the default local file to process all at once in a batch.

Enter LC authority file searches for batch processing

	Action
1	Click **Batch > Enter Authority Search Keys** (<Alt><B><A>).
2	In the **Query** box, enter a full syntax search as you would in the Command Line of the Search LC Names and Subjects window.
3	Click **Add** or press <Enter>. The search is added to the list.
4	Repeat steps 2 and 3 to enter more searches.
5	**Options:** • If you use multiple local files, you can select a different file in the **Local File** list to store the searches. • You can import searches from a text file (***.txt**). Click **Import** and enter the path and file name. **Note:** To prepare the text file, use a text editor such as Notepad. Type each full syntax search on a separate line.
6	When finished, click **Save**.
7	When ready, run batch processing using **Batch > Process Batch**.

Set actions on records for batch processing

	Action
1	Save records you want to batch process in the default local save file. Log off if you are online.
2	Display a record or select records in the local file list, and then click one of the following actions on the **Action** menu: **Add to Authority File**, **Export***, **Replace Record**, **Submit for Review**. ***Note**: You must set the option for batch export in **Tools > Options > Batch**. Otherwise, export occurs right away.
3	When ready, run batch processing using **Batch > Process Batch**.

Remove actions marked for batch from records

Remove the Ready Status from records to remove from batch processing:

	Action
1	Display a marked record or select records in a local save file list.
2	Click **Action > Set Status** (<Alt><Shift><S>).
3	Under **Remove ready status for batch**, select one or more check boxes for actions you want to remove.
4	Click **OK** or press <Enter>.

Run batch processing

The Connexion client automatically logs on to run batch processing.

Required: You must set a general default logon authorization in **Tools > Options > Authorizations** or a file-specific authorization in **File > Local File Manager** (click **Authorization**) for automatic batch logon.

	Action
1	Click **Batch > Process Batch** (<Alt><B><P>).
2	Under **Local Files**, select check boxes for the local file(s) you want to process in a single batch. You can select an unlimited number of both bibliographic and authority files to run at the same time.
3	Under **Process**, click a check box to select searches, record actions, export, and/or label printing (for bibliographic records).
4	Select a processing order in the **Authority Processing Order** list. Select the order separately for authority and bibliographic files. **Default:** Date/Time Added (to the save file).
5	**Optional.** Click **Search Options** to assign a My Status or to apply the default local constant data to records downloaded from searches.
6	When ready, click **OK** or press <Enter>.

Support

Contact OCLC Customer Support
Send an e-mail: **support@oclc.org**
Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
Fax: 1-614-764-2694
(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

From within the Connexion client:
Click **Help > Contact Support**.

Use a **support form** on the Web.

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