

# OCLC Connexion Client Cataloging Quick Reference

## Introduction

The Connexion client is a Windows-based interface to OCLC Connexion® used to access WorldCat for cataloging.

This quick reference provides brief instructions for editing, saving, exporting, and printing labels for bibliographic records; using local files; creating and adding records to WorldCat; replacing master records; batch processing; and cataloging with non-Latin scripts.

**Multiscript support:** The client supports the following non-Latin scripts: Arabic, Armenian, Bengali, Chinese, Cyrillic, Devanagari, Ethiopic, Greek, Hebrew, Japanese, Korean, Syriac, Tamil, and Thai.

This quick reference **does not cover** instructions for authorities work or instructions already available in:



- [Getting Started with Connexion Client](#)
- [Connexion Client Setup Worksheet](#)
- [Connexion: Searching WorldCat Quick Reference](#)

Connexion client documentation assumes knowledge of MARC cataloging.

See the client online Help (**Help > Client Help** or <F1>) or [client system guides on the Web](#). Both Help and the system guides include complete client documentation.

## Open the Connexion client and log on

Open the Search WorldCat client window or browser screen:

	Action
1	Click Windows <b>Start &gt; Programs &gt; OCLC Connexion</b> , or click the client icon on the desktop: 
2	Click <b>File &gt; Logon</b> , or click  , or press <Ctrl><F1>.
3	Enter your OCLC authorization and password, and click <b>OK</b> or press <Enter>.

## Connexion client commands and statuses

### Menus/commands


- To use client functions, click a menu name at the top of the client window, and then click a command.  
Or  
Use equivalent keystroke shortcuts or toolbar buttons (displayed with the command names).
- The client installs with pre-set (“default”) keystrokes and a default set of toolbar buttons on the main client toolbar

### Keystroke shortcuts

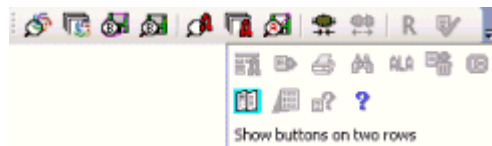
- Use default keystroke shortcuts or assign your own to activate commands, insert characters, run macros, and insert text strings.
- View key assignments in **View > Assigned Keys**. To print or copy the list, click **Print** or **Copy to Clipboard**.  
**Tip:** Before printing, click a column heading to sort the list by data in the column.
- Assign your own keystrokes in **Tools > Keymaps**.
- Print a function key template to put at the top of your keyboard: [www.oclc.org/support/documentation/connexion/client/gettingstarted/keyboardtemplate.pdf](http://www.oclc.org/support/documentation/connexion/client/gettingstarted/keyboardtemplate.pdf).

### Toolbar

- The client installs with three toolbars displayed by default:
  - Main client toolbar (with command-equivalent buttons)
  - WorldCat quick search tool
  - Quick tools for text strings and user tools
- Customize the main client toolbar: In **Tools > Toolbar Editor**, drag and drop buttons to add or remove, or reset to the default.
- Reposition toolbar buttons in the toolbar: Hold down <Alt> and drag and drop a button to a new position.
- Re-position toolbars: Move a toolbar to the right, left, top, or bottom of the client window by dragging and dropping it by its

dotted “handle” ().

- Show or hide toolbars: Click **View > Toolbars**.
- Show toolbar on one line or two: Click the arrow at the right end of the toolbar, and then click **Show buttons on one row** (default) or **Show buttons on two rows**:



### Status bar

- Located at the bottom of the client window, the status bar shows, depending on whether a record or a list is displayed:
  - For a displayed record: Actions and outcomes; source of record; workflow status; My Status; record number of the total in a list; edit mode; session timing if logged on.
  - For a displayed list: Record number of the total in the list for a selected entry.
- Statuses are retained only for online or local save file records.
- To show or hide the status bar, click **View > Status Bar**.

## Selected default function key shortcuts and default toolbar buttons

Client menu > command	Keystroke	Toolbar button***
File > Logon	<Ctrl><F1>	
File > Logoff	<Alt><F1>	
File > Print	<Ctrl><P>	
File > Print List	<Shift><F12>	***
File > Print Label(s)	<Shift><F10>	***
File > Exit	<Alt><F4>	***
Cataloging > Search > WorldCat	<F2>	
Cataloging > Search > Online Save File	<Ctrl><F3>	
Cataloging > Search > Local Save File	<F3>	
Cataloging > Browse > WorldCat	<Ctrl><F2>	
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 > Holdings > Update Holdings	<F8>	
Action > Holdings > Produce & Update Holdings	<Shift><F7>	
Action > Holdings > Delete Holdings	<Shift><F8>	
Action > Lock Master Record	<Alt><F8>	***
Action > Release Record Lock	<Alt><F9>	***
Action > Replace Record	<Alt><F10>	***
Action > Replace & Update Holdings	<Alt><F11>	***
Action > Save to Local File	<F4>	***
Action > Delete Record	<Ctrl><Alt><D>	
Action > Export	<F5>	

Client menu > command	Keystroke	Toolbar button***
View > Navigate Records and Lists > Back	<Shift><F9>	
View > Navigate Records and Lists > Forward	<F9>	
View > Label	<F10>	
View > News	<Ctrl><F5>	
View > Pinned	<Shift><F4>	***
Tools > Check Spelling	<F7>	***
Help > Client Help	<F1>	
Help > MARC Field Help	<Ctrl><F1>	

## Search for WorldCat records

Search WorldCat to find records to use for cataloging.

### Use WorldCat search and browse windows

Click **Cataloging > Search > WorldCat** ( or <F2>). Then:

- In the **Command Line** area: Type a complete **keyword**, **numeric**, or **derived search** or **browse** (index scan). Use full search syntax; that is, a single string with index labels, punctuation, search terms, Boolean operators, and qualifiers, as needed, in correct order.
- Or
- In the **Keyword/Numeric** area: Type or select the parts of a **keyword**, **numeric**, or **derived search** using text boxes and lists.

Or

Click **Cataloging > Browse > WorldCat** ( or <Ctrl><F2>) to enter a guided browse (index scan) using text boxes and lists.

For details on searching and browsing techniques, strategies, syntax, and indexes, see:

- [Connexion: Searching WorldCat Quick Reference](#)
- [Search WorldCat](#) (Connexion client system guide)
- [Searching WorldCat Indexes](#)

### Alternative: Use WorldCat quick search shortcut

If you use the command line to search or browse, enter in the quick search box on the toolbar instead. Click the icon to send the search.

**Example:**




Click the arrow next to the search box to select from 10 previous searches.

Or

Click the arrow next to the icon to clear previous searches or to change the GLIMIR search results option.

**Example:**    
 Clear WorldCat Search History  
 Display results using GLIMIR clustering

## Use features of the Search WorldCat window

Feature	How to use
<b>Retain Search</b>	Select the check box to keep the last search term(s).
<b>Search for</b>	Enter a search in the text box or click the down arrow to select from up to 10 previous searches.
 and 	Click to toggle between displaying short or full index, language, or material type lists.
	Click to customize the short index or material type list.
<b>Apply Language of Cataloging Delimiter</b>	Select check box and then select a language from the list. Applies to searches in command line, keyword/numeric boxes, and quick search box.
<b>Display using GLIMIR clustering</b>	Select the check box to show search results in clusters of records for the same item that have different languages of cataloging.
<b>Enter Diacritics</b>	Click to open a window to insert valid diacritics and special characters by selecting an image or a name.
<b>Expand/Collapse</b>	Click to collapse the Search window to show only the command line or to return to the full window.
<b>Clear Search</b>	Click to clear searches (index selections remain).
<b>Settings</b>	Click to open the Search WorldCat Settings window and select options for displaying search results.

## WorldCat search and browse results

**Search:** The way search results display is based on the number of records retrieved (or you can change how the results display):

Number of records	Client displays
1	Full record.
2 to 5	Brief list: Two-line description of each record.
6 to 100	Truncated list: One-line description, sorted by data in the index you searched.
101 to 1,500	Group list: Entries represent groups of records sorted by MARC format and year of publication.
Over 1,500	Error message: <i>Too many records retrieved. Edit or limit search and try again.</i>

**Browse:** Browsing results in a list of terms that match or closely match your browse term. The match or closest match is highlighted.

To open a record or another list from a results list, double-click an entry, or highlight an entry and press <Enter>.

## Right-click shortcut menu for lists

Right-click in a list. On the popup menu, use the following commands:

Command	Use to ...
<b>Copy</b>	Copy selected entries in the current list.
<b>Select All</b>	Select all list entries
<b>List Settings</b>	Open a window to customize the way the list displays: <ul style="list-style-type: none"> <li>Select or eliminate columns from displaying</li> <li>Move columns to re-order the list</li> <li>Reset the list display to the original</li> </ul>
<b>Reset List Size</b>	Reset column sizes to original (see tip on customizing)

## Tips for customizing a list display

**To resize columns:** Click, hold, and drag the vertical corner of a column.



**To re-sort a list by a column:** Click the heading of the column. The client re-sorts the list immediately by the data in the column.

## Edit records


### About record limits:

- There are no limits on the number of variable fields or total record length.
- The theoretical limit on the number of characters: Up to 99,999.

## View and navigate records

To do this ...	Use these commands or steps ...
Move through three record areas: record information area, fixed field area, and variable field area.	<b>Edit &gt; Next Record Area</b> (or <F6>). Or <b>Edit &gt; Previous Record Area</b> (or <Shift><F6>).
Show or hide drop-down lists of selectable valid values for fixed field elements.	<b>Default:</b> Drop-down lists of values are available for each element. To hide the lists, click <b>Tools &gt; Options &gt; Record Display</b> and click to clear the <b>Use dropdowns...</b> check box.
When you open a record from a list, open the next or previous record without returning to the list.	<b>View &gt; Navigate Records and Lists &gt; Forward</b> (or use  or <F9>). Or <b>View &gt; Navigate Records and Lists &gt; Back</b> (or use  or <Shift><F9>)
"Pin" records of the same type to keep them open.  Records of different types, such as WorldCat vs. save file records, stay open simultaneously by default.	<b>View &gt; Pinned</b> (<Shift><F4>)  Pin a displayed record before opening another of the same type.

## Open MARC field descriptions

Action
Place the cursor in a variable field or a fixed field element, and click <b>Help &gt; MARC Field Help</b> (or use  or <Ctrl><F1>). The description of the field opens in <a href="#">OCLC Bibliographic Formats and Standards</a> .
<b>Note:</b> This command is also on the right-click menu.


## Open RDA Toolkit field descriptions

You must be a subscriber to RDA Toolkit and specify your subscriber logon information in **Tools > Options > RDA**. See the [RDA Toolkit Web site](#) for more information.

Action
Place the cursor in a variable field and click <b>Tools &gt; RDA Toolkit</b> .
<b>Note:</b> This command is also on the right-click menu.

## Insert diacritics and special characters

Enter Latin script diacritics and special characters 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 <b>Edit &gt; Enter Diacritics</b> (or use  or <Ctrl><E>). Or In a search term or a "find" or "replace" term: Click <b>Enter Diacritics</b> in the Search, Browse, or Find/Replace window. Or In a label: View a label for the displayed record ( <b>View &gt; Label</b> ), and click <b>ALA Entry</b> .
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 <b>Insert</b> or <b>Insert and Close</b> .

### Notes:

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

## Create and use constant data

Create and apply MARC-formatted constant data records to add standard content to bibliographic records without having to re-key.

Action	
1	Create a constant data record: Click <b>Cataloging &gt; Create &gt; Constant Data</b> (<Ctrl><Shift><N>) and select a MARC format. <b>Note:</b> If you set the option to use RDA-based workforms to create bibliographic records ( <b>Tools &gt; Options &gt; RDA</b> ), the option also applies to creating constant data. <b>Default:</b> AACR2-based workforms.
2	Add or edit data and save the new constant data record: Click <b>Action &gt; Save Record to Online File</b> (<Ctrl><Alt><V>) (must be logged on) or <b>Save Record to Local File</b> (<F4>), and then: <ul style="list-style-type: none"> <li>• <b>Required.</b> Assign a name to the constant data record.</li> <li>• <b>Optional.</b> Click the check box to set the new constant data record as the default, if you use it often.</li> <li>• <b>Optional.</b> Add a free-text My Status to help retrieve the record (for instructions, see the <b>"Tip"</b> below for adding My Status to save file records).</li> </ul>
3	In the Fields to Apply window, click a button to determine which fields in the constant data record to apply: <b>Fixed</b> , <b>Variable</b> , or <b>Both</b> .


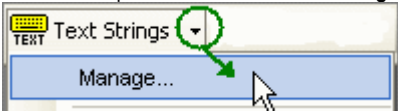
To apply default constant data:

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


## Create and use text strings

Text strings supplement constant data for entering frequently used, brief data anywhere in a record.

To create a text string:

Action	
1	Click <b>Tools &gt; Text Strings</b> . Or click the text strings quick tool on the toolbar:  Or click the arrow in the quick tool and then click <b>Manage</b> . 
2	In the Text Strings window that opens, click <b>Add</b> .
3	Enter a unique name in the <b>Description</b> box.
4	Enter the text string you want to use in the <b>Text</b> box. Text can be: <ul style="list-style-type: none"> <li>• A data cell in a field</li> <li>• A field (omit spaces between tag, indicators, and field data)</li> <li>• Multiple fields (enter each field on a separate line)</li> </ul>
5	Click <b>OK</b> to save the text string.

To insert a text string:


Action	
Place the cursor where you want to insert text, and then: Click <b>Tools &gt; Text Strings</b> . Select a text string and click <b>Apply</b> . Or Click the arrow in the Text Strings quick tool. Click a text string name. 	

## Validate records

**Automatic validation.** Taking a final action on a record interactively or via batch processing automatically validates the record, **except**, by default, when you export or set holdings on existing records. To change validation for these two actions:


Action	
1	Click <b>Tools &gt; Options &gt; General</b> . Then click <b>Validation Level Options</b> .
2	Under <b>Bibliographic Master Records</b> , select one of the following for <b>Set Holdings</b> : <ul style="list-style-type: none"> <li>• <b>Full</b> (basic validation and verifies relationships among elements)</li> <li>• <b>Basic</b> (verifies MARC record structure, including elements, length, repeatability, type of data and codes)</li> <li>• <b>Structure (default)</b> (minimal validation for set holdings actions)</li> </ul> Select one of the following for <b>Export</b> : <ul style="list-style-type: none"> <li>• <b>Full</b> (same as above)</li> <li>• <b>Basic</b> (same as above)</li> <li>• <b>None (default)</b> (no validation for export)</li> </ul>

**Separate validation.** To validate records before taking actions:

Action
With a WorldCat record or local or online save file record open, or with records selected in a list, while logged on or offline: Click <b>Edit &gt; Validate</b> (or use  or <Shift><F5>).

## Control headings in bibliographic records

When you control a heading, the system finds a matching authority record and inserts the heading in the bibliographic record as a link. The system automatically maintains future changes to the heading.

Action
Display a record and click <b>Edit &gt; Control Headings</b> . Then click to select: <ul style="list-style-type: none"> <li>• <b>*Single</b> (or use  or &lt;F11&gt;) (controls heading of field where cursor is located if exact match is found)</li> <li>• <b>All</b> (Shift&lt;F11&gt;) (controls all headings if matches are found)</li> <li>• <b>*Uncontrol Single</b> (&lt;Ctrl&gt;&lt;F11&gt;) (uncontrols heading in field where cursor is located; you must uncontrol a heading to edit the text)</li> <li>• <b>Uncontrol All</b> (uncontrols all headings)</li> </ul> <p><b>*Note:</b> These two commands are also on the right-click menu.</p>

### Controllable fields

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

Notes on results
<b>Control Single:</b> If the system does not automatically control a heading, the Control Headings window opens. Use it to select or build and insert a controlled heading manually. The window opens when the system finds: <ul style="list-style-type: none"> <li>• An unqualified personal name match (contains #a only)</li> <li>• No exact matches</li> <li>• Multiple records that partially match</li> </ul>
<b>Control All:</b> If some headings are not controlled, try controlling each singly.
<b>Hyperlink:</b> Controlled headings are hyperlinked to the controlling authority record(s). Click a link to open authority record.
<b>Add or Replace record:</b> You must add a new record or replace an existing master record to retain newly controlled heading(s). <ul style="list-style-type: none"> <li>• To add records, use <b>Action &gt; Holdings &gt; Update Holdings</b> [or <b>Produce and Update Holdings</b> or <b>Alternate Produce and Update</b>].</li> <li>• To replace records, use <b>Action &gt; Replace Record</b> [or <b>Replace and Update Holdings</b>]. The system locks the record automatically before replacing it.</li> </ul> <p>You must have a Full or higher logon authorization to add or replace records.</p>
<b>If the heading changes in the system later:</b> OCLCA is automatically added in field 040 #d.

## Insert data from related records

Build a field 760 - 787 or 800, 810, 811, or 830 and automatically insert data from a bibliographically related (cited) record:

Action
1 While logged on, add a blank field to a record using <b>Edit &gt; Cut Copy Paste &gt; Insert Blank Field</b> , or position the cursor in the field above and press <Enter>.
2 Enter one of the following tags: 760, 762, 765, 767, 770, 772, 773, 774, 775, 776, 777, 780, 785, 786, 787, 800, 810, 811, or 830
3 Enter appropriate indicators. Then enter the OCLC number, with or without the pound sign (#), for the related record to cite.
4 Click <b>Edit &gt; Insert from Cited Record</b> (or press <Alt><E><I>). <b>Note:</b> This command is also on the right-click menu.  <b>Example:</b> Create a new field and enter tag <b>780</b> , indicators <b>0 0</b> , and OCLC number <b>11553638</b> . The client puts the OCLC number in #w and enters the data from record 11553638. The new field looks like this:  <b>780 0 0 Episcopal Church. Diocese of Southern Ohio. # Journal of the ... annual convention #w (OCoLC)11553638</b>

## Get a Dewey or LC classification number

Use the FRBR-based prototype OCLC Classify Web service to retrieve a classification number from a matching WorldCat record for any material type:

Action
With any bibliographic record open, click <b>Edit &gt; Classify</b> .
<b>Notes:</b> <ul style="list-style-type: none"> <li>• You must designate a classification scheme and variable field in <b>Tools &gt; Options &gt; Classify</b>.</li> <li>• The client sends the Classify Web service the following numbers from the displayed record for matching in WorldCat, in this order: OCLC control number, ISBN, ISSN, UPC, and LCCN.</li> </ul>

## Right-click shortcut menu for records

Right-click in a record and use any of the following commands on the popup menu. All commands are also on client menus except the one with an asterisk (\*) and a note.

<b>Undo</b>	<b>Transliterate &gt; Arabic</b> [or <b>Persian</b> ]
<b>Cut</b>	<b>Right-to-Left Reading Order</b>
<b>Copy</b>	<b>Insert from Cited Record</b>
<b>Paste</b>	<b>Edit with Guided Entry</b>
<b>Paste Unformatted</b>	<b>*Insert Unicode Control Characters</b>
<b>Delete Field</b>	<b>Link Fields</b>
<b>Copy Field</b>	<b>Unlink Fields</b>
<b>Copy Control Number</b>	<b>MARC Field Help</b>
<b>Control Single Heading</b>	<b>RDA Toolkit</b>
<b>Uncontrol Single</b>	
<b>*Note:</b> This command is available only on the right-click menu. Clicking the command opens a list of characters which you can select from.	



Default keystroke shortcuts for editing and navigating in records

More keystroke shortcuts for editing and navigating in records		
Keyboard shortcut	Corresponding Edit > Cut Copy Paste command	Use to do this ...
<Alt><E><O>	<b>*Copy as Text</b> [* = also on right-click menu]	Copy selected content as plain text (ASCII format).
<Alt><E><S>	<b>* Paste Unformatted</b>	Paste content from a Web page as a single block.
<Ctrl><Z>	<b>* Undo</b>	Undo the last edit.
<Ctrl><Shift><Z>	<b>Cancel Changes</b>	Cancel all edits since the last save.
<Alt><Delete>	<b>* Delete Field</b>	Delete current field.
<Alt><Insert>	<b>* Copy Field</b>	Copy current field.
<Alt><Up arrow> And <Alt><Down arrow>	<b>Move Field &gt; Up [or Down]</b>	Move current field up or down one position.  <b>In fixed field with drop-down lists displayed:</b> Display current drop-down list so you can use arrow keys to scroll up or down.
<Enter> And <Shift><Enter>	<b>Insert Blank Field &gt; Above Current Field [or Below Current Field]</b>	Insert blank field above or below current field.
<Ctrl><T>	<b>* Copy Control Number</b>	Copy OCLC number.
<Up arrow> And <Down arrow>	None	Move cursor to same position in line above or line below.  <b>In fixed field with drop-down lists displayed:</b> Move cursor up or down in list of values for current element.
<Shift><Up arrow> And <Shift><Down arrow>	None	<b>In fixed field:</b> Move cursor up or down to the fixed field element immediately above or below.
<Alt><Up arrow> And <Alt><Down arrow>	None	Move the current field up or down one position.  <b>In fixed field with drop-down lists displayed:</b> Display the current drop-down list so that you can use arrow keys to scroll.
<Ctrl><Up arrow> And <Ctrl><Down arrow>	None	Move scroll bar up or down one line.

More keystroke shortcuts for editing and navigating in records		
Keyboard shortcut	Corresponding Edit > Cut Copy Paste command	Use to do this ...
<Right arrow> And <Left arrow>	None	Move cursor to right or left one character.
<Ctrl><Right arrow> And <Ctrl><Left arrow>	None	Move cursor to first character of next word or to first character of previous word.  <b>In fixed field:</b> Move cursor to the right or left one cell.
<Shift><Arrows>	None	<b>In variable fields:</b> Select characters (right/left arrows) or lines (up/down arrows), one at a time.
<Tab>	None	Move cursor to next field.  <b>In fixed field with drop-down lists displayed:</b> Move cursor forward (to the right) from element name to cell, etc.
<Shift><Tab>	None	Move cursor to previous field.  <b>In fixed field with drop-down lists displayed:</b> Move cursor backward (to the left) through cells.
<Page up> And <Page down>	None	Scroll window up or down one "page" (screen) to display content immediately above or below current display.
<Delete>	None	Delete highlighted text, or if no text is highlighted, deletes one character to the right of the cursor.
<Alt><Delete>	None	Delete current variable field.
<Backspace>	None	Delete highlighted text, or if no text is highlighted, delete one character to the left of the cursor.
<Home>	None	Move cursor to beginning of cell.
<Ctrl><Home>	None	Move cursor to beginning of record.
<End>	None	Move cursor to end of cell.
<Ctrl><End>	None	Move cursor to end of record.
<Ctrl><F7>	None	Delete text from cursor to end of cell.
<Alt><F7>	None	Delete current word .
<Ctrl><S>	None	Move cursor to next subfield or to beginning of next field.
<Shift><Ctrl><S>	None	Move cursor to previous subfield or to end of previous field.

## Save records

### Save bibliographic 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 <b>Action &gt; Save Record to Online File</b> (<Ctrl><Alt><V>) (must be logged on) or click <b>Action &gt; Save Record to Local File</b> (<F4>) (can be logged on or offline).
<b>Notes on results:</b>	
	<ul style="list-style-type: none"> <li>Records saved to the online file no longer expire (as of May 4, 2014)</li> <li>Locked master records are unlocked after 14 days.</li> <li>The client automatically saves local save file records after actions.</li> <li>The maximum number of records for both local and online files is 9,999.</li> </ul>

### 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 <b>Action &gt; Set Status</b> (or press <Alt><Shift><S>). Or set a default My Status in <b>Tools &gt; Options &gt; My Status</b> 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, a project name, or a combination of these.
3	Click <b>OK</b> or press <Enter>.

### Delete records from the save file

Action	
	Display a save file record or select records in a list, and click <b>Action &gt; Delete Record</b> (or click  or press <Ctrl><Alt><D>).

### Search for specific save file records

Action	
1	Click <b>Cataloging &gt; Search &gt; Online Save File</b> (or click  or press <Ctrl><F3>) (must log on). Or click <b>Cataloging &gt; Search &gt; Local Save File</b> (or click  or press <F3>).
2	Enter one or more search terms in <b>Search for</b> box(es), 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 <b>OK</b> or press <Enter>.

### Find save file records by statuses or by limits only

Action	
1	Click <b>Cataloging &gt; Show &gt; By Online Save File Status</b> (<Ctrl><O>) (must log on) [or <b>By Local Save File Status</b> (<Alt><C><H><L>)].

2	Select status(es) or limit(s).
3	Click <b>Show Records</b> or press <Enter>.

### Tip: Quick way to retrieve save file records

Retrieve all records in the save file and then sort by data in columns.

Action	
1	Click <b>Cataloging &gt; Search &gt; Online Save File</b> [or <b>Local Save File</b> ].
2	Do not enter any terms or criteria in the Search window. Click <b>OK</b> .
3	Sort the 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 <b>OK</b> or press <Enter>.

### Save file indexes

Online file index	Description / Search format
Save File Number	Enter number (1 to 9,999).
OCLC Control Number	Indexes 001 (fixed field) and 019. Enter complete number.
Title	Indexes 245 a b f g k n p. Enter one or more words from title, separated by spaces.
URL	Enter complete URL for Web resource. Omit separator characters (, and /). Include or omit <b>http://</b> .
Used Date (date of last modification or re-save)	Enter all 8 digits of date, in format <i>yyyymmdd</i> . Omit hyphens or other separators.
My Status	Enter My Status identifier you assigned.

Local file index	Definition / Search format
Save File Number	Enter number (1 to 9,999).
OCLC Control Number	Indexes 001 a and 019 a. Enter complete number.
Title	Indexes 245 a b f g k n p and 246 a b f g n p. Enter one or more words from title, separated by spaces. <b>Alternative.</b> Combine words with Boolean <b>or</b> or <b>not</b> .
Name	Indexes 100, 110, 111, 130, 700, 710, 711, and 730 (all subfields). Enter one or more parts of name, separated by spaces. <b>Alternative.</b> Combine names with Boolean <b>or</b> or <b>not</b> .
Standard number	Indexes 010 a b z; 020 a z; 022 a y z; and 028 a. Enter all digits of the number.
Holding Library Code	Indexes 049 a. Enter a holding library code.
My Status	Enter the My Status identifier you assigned.

## OCLC Connexion Client Cataloging Quick Reference

### Use local files

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

- DefaultBib.bib.db
- DefaultBibCD.bibcd.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 local files.

	Action
1	Click <b>File &gt; Local File Manager</b> (<Alt><F><L><F>).
2	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: <ul style="list-style-type: none"> <li>• <b>Configure Paths</b> to create or delete a local file path name.</li> <li>• <b>Auto Back Up</b> to clear or select automatic back up and a location.</li> <li>• <b>Create</b> to create a new file (type the file name only; the client supplies the correct file extension).</li> <li>• <b>Delete</b> to delete the selected file (you cannot delete the default file).</li> <li>• <b>Set as Default</b> to set the selected file as the default.</li> <li>• <b>Authorization</b> to assign a logon authorization and password to use for logon whenever the selected file is open.</li> <li>• <b>Statistics</b> to show the number of records in the file by specific record statuses.</li> <li>• <b>Compact/Repair</b> 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.</li> </ul>

### Take final actions on 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 WorldCat 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 [OCLC Cataloging Authorizations: 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 WorldCat records (records that have OCLC numbers) and workforms (new records not yet added).

To export records:

Action
Display a record or select records in a list, and click <b>Action &gt; Export</b> (or use  or <F5>).
<b>Caution:</b> 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 in 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 requires a minimum authorization of Limited.


	Action
1	Log on. With a record displayed, click <b>Action &gt; Report Error</b> .
2	Complete required fields: OCLC symbol, user name, e-mail.
3	<b>Optional.</b> Select a check box to receive a copy of your report.
4	In the large text box, describe the error.
5	Click <b>Report Error</b> . The client automatically attaches a copy of the displayed record and sends the report to OCLC quality control staff.

### Print labels

#### Edit and print labels for one record

- Printing labels requires no minimum authorization level.
- Records must have a call number in order to print labels.

**Tip:** By default, labels print immediately whether you are logged on or offline. Check the **Label** status in the status bar of a record or in the **Label** column of a list. If it is **R** (Ready), your option in **Tools > Options > Batch** is set to batch print labels.

	Action
1	Logged on or offline, display a record and click <b>View &gt; Label</b> (or use  or <F10>). The client extracts the following information from the record and inserts it in the displayed label: <ul style="list-style-type: none"> <li>• Author from main entry fields 1xx</li> <li>• Title from 245 ‡a</li> <li>• Call number based on logon authorization</li> <li>• Input stamp based on 049 ‡a</li> </ul>
2	Edit the label, if needed, and set parameters for print constants, number of copies, and more.
3	Click <b>Print</b> or press <Enter>.



## Print labels for multiple records without editing

Action	
1	Logged on or offline, display a record or select records in list, and click <b>File &gt; Print Label(s)</b> (or use <Shift><F10>).
2	<b>Optional.</b> Print more than one copy or specify print constants for multiple copies or parts.
3	Click <b>OK</b> or press <Enter>.

## Save labels

Print labels to a file, or edit records with label data and then save them:


Action
Click <b>Tools &gt; Options &gt; Printing</b> , click <b>Label Options</b> , and then select the <b>Output to Text File</b> check box. Then print the labels. Or Edit records with content required to produce the labels you want, and then save the records to print labels later. See client Help for more information.

## Take update or produce and update actions


- Produce and update actions require a minimum authorization level of Full.
- **Add holdings.** Update holdings to add your OCLC institution symbol to a WorldCat record to indicate that your library holds the item.
- **Add new records.** Produce and update actions on workforms also add records you create to WorldCat (the system assigns an OCLC number). See more about [creating and adding new records](#) and more about [batch processing record actions](#).

## Update or delete holdings


To update holdings for a record:

Action
While logged on, display an existing record, and click <b>Action &gt; Holdings &gt; Update Holdings</b> (or use  or <F8>).

To delete holdings from a record:

Action
While logged on, display an existing record, and click <b>Action &gt; Holdings &gt; Delete Holdings</b> (or use  or <Shift><F8>).

## Produce and update holdings

Action
Display a record, or select records in a list, and click <b>Action &gt; Holdings &gt; Produce and Update Holdings</b> (or use  or <Shift><F7>), or click <b>Action &gt; Holdings &gt; Alternate Produce and Update</b> .
These commands trigger other OCLC services to produce catalog cards or accession lists, depending on specifications in your OCLC cataloging profile. Use <b>Produce and Update Holdings</b> to: <ul style="list-style-type: none"> <li>• Receive catalog cards for the receiving catalogs of the first holding library code in field 049 #a of a record.</li> <li>• Add the record to OCLC MARC Record Subscription file or tape.</li> <li>• Generate an item on the list from OCLC Accessions List service.</li> </ul> Use <b>Alternate Produce and Update</b> to: <ul style="list-style-type: none"> <li>• Order extra cards for the receiving catalogs of the first holding library code in field 049 #a of a record (1-255) (you enter the number of extra cards)</li> <li>• Order cards for the receiving catalogs for all holding library codes in 049 #a (you select <b>All Produce</b>).</li> <li>• Order cards for the receiving catalogs for the first holding library code in 049 #a (you select <b>Ad Produce</b>).</li> </ul>

## Display holdings for a record

Action
1 Display a record and click <b>View &gt; Holdings</b> .
2 Click <b>Default, All, Regional, or State</b> .
3 <b>Optional.</b> <ul style="list-style-type: none"> <li>• To pop up the institution name for a symbol, move the mouse pointer over the symbol in the holdings list.</li> <li>• To print the displayed list of holdings, click <b>Print</b>.</li> </ul>

## Launch local holdings maintenance in the Connexion browser

- Creating and maintaining local holdings records (LHRs) requires a minimum authorization of Full.
- To check whether a bibliographic record has LHRs attached, see the holdings statement at the top of the record.  
**Example:** *Held by OCL/Local OCL holdings - 12 other holdings*
- You can open local holdings maintenance, which is in the Connexion browser interface, from within the Connexion client.

To open a Connexion browser session for maintaining LHRs:

Action
1 Display a WorldCat record or a record from the online or local save file.
2 Logged on or offline, click <b>Tools &gt; Launch Local Holdings Maintenance</b> (<Alt><T><L>). The client opens Connexion in the browser interface, and automatically logs you on. After logon, the LHR or list of LHRs displays in the browser screen.
3 Modify the LHR(s).
4 When finished, close the browser window to log off automatically.

## Create records and add to WorldCat

### About record limits:

- There are no limits on the number of variable fields or total record length.
- The theoretical limit on the number of characters is: Up to 99,999.

- No minimum authorization is required to create records.
- Adding new records requires a minimum authorization level of Full.
- **Always search WorldCat** for your item and search again before adding your record to WorldCat to prevent duplicate records.
- **Required.** Define a classification scheme, holding library code, and institution symbol in **Tools > Options > General, Offline Cataloging Options**.

You can create a record from an existing record or from a workform, or you can import records from your local system.

### Derive a new record from an existing record

Retrieve a WorldCat record that closely matches, or is related to, the item you are cataloging. Use it to derive a workform for a new record:

	Action
1	Display a record, and click <b>Edit &gt; Derive &gt; New Record</b> (<Ctrl><Alt><C>).  <b>Options:</b> <ul style="list-style-type: none"> <li>• Select fields to transfer in <b>Tools &gt; Options &gt; Derive Record</b>.</li> <li>• Change the MARC format using the fixed field drop-down list.</li> </ul>
2	Click <b>Yes</b> to transfer or <b>No</b> to suppress transferring fixed field values.
3	Add data and edit the record as needed to complete the record, and then save it or add it to WorldCat:  Click <b>Action &gt; Holdings</b> , and then click one of the following: <ul style="list-style-type: none"> <li>• <b>Update Holdings</b></li> <li>• <b>Produce and Update Holdings</b></li> <li>• <b>Alternate Produce and Update Holdings</b></li> </ul> See <a href="#">definitions</a> of Produce and Update commands above.  If you are not authorized to add records to WorldCat, you can save, print, or export the new record.

### Create a record from a workform (AACR2- or RDA-based template)

Open a workform in a MARC format you select:

	Action
1	Click <b>Cataloging &gt; Create &gt; Single Record</b> , and then click one of the following MARC formats:  Books, Computer Files, Continuing Resources, Maps, Mixed Materials, Scores, Sound Recordings, or Visual Materials
2	Add data and edit as needed to complete the record, and then save it or add it to WorldCat (see step 3 in the procedure above for deriving a new record).

**Note:** By default, the workform that opens is based on AACR2. To use RDA-based workforms, set an option in **Tools > Options > RDA**.

## Create records for electronic resources

Automatically extract metadata from an electronic file and insert the data into a workform to create a preliminary new record.

	Action
1	Click <b>Cataloging &gt; Create &gt; Extract Metadata</b> (or press <Alt><C><C><X>).
2	In the <b>Resource</b> box, enter the full URL of a Web page (begin with <b>http://</b> or <b>https://</b> ), or enter the full path and file name of a file on your workstation or a network drive.  <b>File types available:</b> *.htm or *.html (Hypertext Markup Language), *.pdf (Adobe Portable Document), *.doc (Microsoft Office Word), and *.mp3 (MP3 audio).  <b>File size limit:</b> 50 MB
3	<b>Optional for *.html and *.htm files only:</b> Select the <b>Create multiple records from one Web site</b> check box (also creates records from files linked from the Web page for the supported file types listed in step 2 above).
4	Click <b>OK</b> , or press <Enter>. Or If you opted to create records from linked files, select the links from the list that the client displays, and then click <b>Start</b> .
5	Check, edit, and add data to record(s) as needed to complete them, and then save or add the new record(s) to WorldCat (see step 3 in the procedure for deriving new records).

## Import records

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

	Action
1	Click <b>File &gt; Import Records</b> (<Alt><F><I>).
2	Type the full path and file name of your import file, or click <b>Browse</b> to navigate to the file.  <b>Required.</b> Files must be MARC-compatible (for example, files with the extension *.dat).
3	Select <b>Import to Online Save File</b> (must log on) or <b>Import to Local File</b> (logon not required, but requires cataloging settings in <b>Tools &gt; Options &gt; General / Offline Cataloging Options</b> ).
4	<b>Optional.</b> <ul style="list-style-type: none"> <li>• Click <b>Options</b> to apply default constant data or assign a My Status.</li> <li>• Click <b>Record Characteristics</b> to select a record format (default: MARC 21) and a character set (default MARC-8) for imported records.</li> </ul>
5	Click <b>OK</b> or press <Enter>.
6	Click <b>Yes</b> to delete your original file or <b>No</b> to keep it.
7	A temporary <b>Import Report</b> displays. Print or copy if needed.

## Replace master records

Replacing master bibliographic records in WorldCat requires a minimum authorization level of Full.

	Action
1	Log on and retrieve the WorldCat record you want to modify.
2	<b>Optional.</b> Click <b>Action &gt; Lock Master Record</b> (<Alt><F8>).
3	Add or edit data in the record.
4	Click <b>Action &gt; Replace Record</b> (<Alt><F10> or <b>Action &gt; Replace and Update Holdings</b> (<Alt><F11>). <b>Notes:</b> <ul style="list-style-type: none"> <li>The system locks the record automatically before replacing, if not already locked, and then unlocks it when the action is completed.</li> <li>If the record replaced is in the online save file, the system automatically deletes it unless you re-save before you close it.</li> </ul>

## Batch-process searches and record actions

Enter WorldCat searches and/or mark records for actions in one or more local files to process all at once in a batch.

### Enter WorldCat searches for batch processing

	Action
1	Click <b>Batch &gt; Enter Bibliographic Search Keys</b> (<Alt><B><B>).
2	In the <b>Query</b> box, enter a full syntax search as you would in the Command Line of the interactive Search WorldCat window.
3	Click <b>Add</b> or press <Enter>. The search is added to the list.
4	Repeat steps 2 and 3 to enter more searches.
5	<b>Option:</b> Import searches from a text file (*.txt). To prepare the text file, use a text editor such as Notepad. Type each search in full syntax on a separate line. In the Enter Bibliographic Search Keys window: Click <b>Import</b> and enter the path and file name.
6	When finished, click <b>Save</b> .
7	When ready, run batch processing. See <a href="#">Run batch processing</a> below.

### Set actions on records for batch processing

	Action
1	Save records you want to batch-process in a 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 <b>Action</b> menu: <b>Delete Holdings, Produce, Replace, Submit for Review, Update Holdings, or Export.*</b> Or to batch print labels, click <b>File &gt; Print Label(s)*</b> . <b>*Required:</b> For batch <b>Export</b> and <b>Print Label(s)</b> , you must set options in <b>Tools &gt; Options &gt; Batch</b> to prevent immediate export or print.
3	When ready, run batch processing. See <a href="#">Run batch processing</a> below.

## Remove actions from records marked for batch

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

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

To run batch processing:

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

## Quick batch: Set or delete holdings by entering OCLC numbers

Batch-process **Update Holdings, Produce and Update Holdings, or Delete Holdings** by entering only the OCLC numbers of records. You do not have to retrieve the records first before taking these actions.

	Action
1	Click <b>Batch &gt; Holdings by OCLC Number</b> (<Alt><B><H>).
2	Enter OCLC record numbers in the large text box, one number per line. Or Click <b>Import</b> and enter the path and file name of a text file of OCLC numbers (each on a separate line) or navigate to the file. <b>Recommended limit:</b> No more than 2,500 OCLC numbers per batch
3	Select a button next to the holdings action you want to process.
4	When ready, click <b>OK</b> or press <Enter> to batch-process immediately.

## Use non-Latin scripts for cataloging

The client supports the following non-Latin scripts: Arabic, Armenian, Bengali, Chinese, Cyrillic, Devanagari, Ethiopic, Greek, Hebrew, Japanese, Korean, Syriac, Tamil, and Thai.

**Input methods.** If you use non-Latin scripts and English is the default language on your workstation, you may need to install other languages and input keyboards or Input Method Editors (IMEs) in Windows. Access to languages and input keyboards may differ according to your version of Windows. See Windows Help (**Start > Help and Support**) for information and instructions.

**Alternative: RLIN21 keyboards.** See instructions in [Getting Started](#) for installing RLIN21 keyboards for Arabic, Cyrillic, and Hebrew scripts.

**Valid characters.** Character sets in [MARC 21 Specifications for Record Structure, Character Sets, and Exchange Media, Code Tables](#) define the scope of valid characters for Arabic, Chinese, Cyrillic, Greek, Hebrew, Japanese, and Korean.

For Bengali, Devanagari, Tamil, and Thai, the client supports Unicode 4.0 characters in these ranges: U+0980 to U+09FF (Bengali), U+0900 to U+097F (Devanagari), U+0B80 to U+0BFF (Tamil), and U+0E01 to U+0E5B (Thai).

### Guidelines

- Records with non-Latin script data must meet MARC standards.
- Use non-Latin script data only, or romanized (Latin-script equivalent) data only, or both in records.
- Follow guidelines in [ALA - LC Romanization Tables](#) for romanized data.
- Use multiple supported non-Latin scripts anywhere in a record, including within a single field.

### Client tools for non-Latin scripts in records

Use the following commands as tools to help manage multiscript data:

#### Edit > Linking Fields > Link or Unlink

Links or unlinks non-Latin script fields with Latin script fields.

**Note:** This command is also on the right-click menu in records.

#### Edit > MARC-8 Characters > Convert to MARC-8 CJK

Converts non-MARC-8 CJK characters to equivalent MARC-8.

#### Edit > MARC-8 Characters > Verify or Clear

Verifies characters separately from record validation or clears highlights from invalid characters. Unavailable for Bengali, Devanagari, Tamil, and Thai. These scripts are verified when you validate records.

#### Edit > Transliterate > Arabic or Persian

Transliterates romanized data in records into Arabic script data.

**Note:** These commands are also on the right-click menu.

#### File > Import Records; click Record Characteristics

Select a record standard (default: MARC 21) and character set (default: MARC-8) for imported records.

#### Tools > CJK E-Dictionary

Helps select characters for Chinese, Japanese, and Korean script data.

#### Tools > Options > Export; click Record Characteristics

Select a record standard (default: MARC 21) and character set (default: MARC-8) for imported records.

**Tools > Options > International.** Select or clear options for:

- Retaining types of data and sorting data in exported records.
- Including paired fields in workforms automatically.
- Changing the client interface language (Chinese, simplified, or traditional; English; German; Japanese; Korean; or Spanish).
- Transliterating romanized data into Arabic script in designated fields of WorldCat records that you retrieve interactively.

#### View > Align Right

Align Arabic or Hebrew script data for record display and print.

**Note:** This command is also on the right-click menu.

#### On right-click menu only—Insert Unicode Control Characters

Insert control characters to correctly display left-to-right multiple-digit numbers and punctuation in Arabic, Persian, and Hebrew records.

## Support

### Contact OCLC Customer Support

Send an e-mail: [support@oclc.org](mailto: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.

## Order a print copy of this publication

To order print copies of this publication at no charge:

#### Action

Send an e-mail request to [orders@oclc.org](mailto:orders@oclc.org). Include the product code REF1110.

#### Or

Use the [Online Service Center](#):

1. Log on and click **Documentation** in the “Order OCLC products and services” list on the left.
2. Locate *OCLC Connexion Client Cataloging Quick Reference* in the list and click **Add to shopping cart**. Alternatively, you can click a link to preview or print this document in HTML or PDF.
3. When finished, complete your order.