Connexion Client Module 03: Basic editing & record processing

Introduction

Whether you do copy or original cataloging, it is important to know how to add information to local records or edit information in the record that pertains to the item for your collection.

This module provides instruction on how to edit local records, how to maintain holdings in WorldCat and how to export edited records to use in your library catalog. At the end of this module, learners will be able to perform these actions, customize some options and configure an export destination.

Menu commands in Connexion Client

On the menu bar

| File | Cataloging | Authorities | Edit | Action | Batch | View | Tools | Window | Help |

Copy cataloging workflow

- Search
  - Cataloging > Search > WorldCat
- Set/Delete Holdings
  - Action > Holdings > Update Holdings
  - Action > Holdings > Delete Holdings
- Export a record
  - Action > Export

Edit records

- Cut, copy, or paste
  - Edit > Cut Copy Paste > Cut
  - Edit > Cut Copy Paste > Copy
  - Edit > Cut Copy Paste > Paste
- Undo
  - Edit > Cut Copy Paste > Undo
- Delete a field
  - Edit > Cut Copy Paste > Delete Field
- Cancel changes made in a record
  - Edit > Cut Copy Paste > Cancel Changes
Spell check
- Conduct spell check:
  - Tools > Spell Check
- Set up spell check options:
  - Tools > Options > Spelling (tab)

Export options
- Set export destination and options
  - Tools > Options > Export (tab)
  This tab allows you to specify:
    - Where records are exported (file or direct to local catalog)
    - Record standard and character set for exported records
    - Fields to automatically delete on export

Validate records
- Conduct validation
  - Edit > Validate
- Set up validation options
  - Tools > Options > General > Validation Level Options

Connexion status bar

<table>
<thead>
<tr>
<th>Delete Holdings</th>
<th>Export/C</th>
<th>Label</th>
<th>Produce</th>
<th>Submit</th>
<th>Replace</th>
<th>Report Error</th>
<th>Update Holdings</th>
<th>Validate</th>
</tr>
</thead>
<tbody>
<tr>
<td>C = Complete</td>
<td>R = Ready (operation is set to be performed in batch mode)</td>
<td>F = Failed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Selected default keystroke shortcuts in Connexion client

Navigate within a record

- Move between OCLC number, fixed, & variable fields .......................... <F6>
- Move to next cell Press ...................................................................... <Tab>
- Move to previous cell ....................................................................... <Shift><Tab>
- Move to next subfield in variable fields ........................................... <Ctrl><S>

Edit Text

- Delete entire field ................................................................................... <Alt><Del>
- Copy entire current field ...................................................................... <Alt><Insert>
- Undo edits in current cell ..................................................................... <Ctrl><Z>
- Cancel all edits in entire record *(Caution!)* ........................................ <Ctrl><Shift><Z>
- Delete from cursor to end of cell ......................................................... <Ctrl><F7>
- Delete current word ............................................................................... <Alt><F7>
- Spell Check ............................................................................................ <F7>

- Cut selected text .................................................................................... <Ctrl><X>
- Copy selected text ................................................................................ <Ctrl><C>
- Paste selected text ................................................................................ <Ctrl><V>

- Insert field below current field .............................................................. <Enter>
- Insert field above current field ............................................................. <Shift><Enter>
- Move current field up .......................................................................... <Alt><Up Arrow>
- Move current field down Press ............................................................. <Alt><Down Arrow>
- Insert delimiter: ‡ ............................................................................... <Ctrl><D>

- Reformat record ...................................................................................... <Ctrl><R>
- Validate record ...................................................................................... <Shift><F5>

Record Actions

- Update Holdings ....................................................................................... <F8>
- Produce and Update Holdings ............................................................... <Shift><F7>
- Delete Holdings ..................................................................................... <Shift><F8>
- Export Record ......................................................................................... <F5>
Test your knowledge

1. With a record displayed, what is the best way to locate information about a field?
   A. Open Bibliographic Formats and Standards and navigate to the page that describes the field
   B. Search the field number in a web browser
   C. Right click in the field and select MARC field help from the list presented
   D. Contact OCLC Customer Support

2. The Edit, Add, and Delete commands used to modify information in a record are not reversible.
   A. True
   B. False

3. What is the purpose of Update holdings?
   A. This command adds your OCLC symbol to a bibliographic record when multiple copies of a title are part of your collection
   B. This command removes your OCLC symbol from a bibliographic record in WorldCat
   C. This command adds your OCLC symbol to a bibliographic record in WorldCat
   D. This command adds your OCLC symbol to the bibliographic record and prints catalog cards

4. What is an important reason to use Delete holdings?
   A. This allows you to see whether the title is in your collection and supports the accurate discovery of the title in WorldCat
   B. This removes a record from WorldCat
   C. This ensures that ILL staff will not receive requests for items removed from your collection.
   D. This command removes any edits or changes made to the record in WorldCat.

5. Match the keystroke to the command
   A. Update holdings
   B. Delete holdings
   C. Export a record
   D. Insert a blank field
   E. Insert a delimiter symbol
   _____ Enter
   _____ F5
   _____ Shift + F8
   _____ CTRL + d
   _____ F8
Test your skills

1. Search #1012647794 in the quick search box.

2. Navigate to these fields, then identify the field tag for each one:
   a. Field 015
   b. Field 084
   c. Field 505
   d. BONUS: what do the indicators in field 505 mean?

3. How do you delete a field? How does this delete action affect the WorldCat record?

4. Add field 590 with this information: “Staff selection for book clubs.” What process did you use to add this field?

5. Change the first indicator of the 300 field to 3 (intentional error).

6. Validate the record
   a. What command or keystroke did you use for this action?
   b. What is the value next to Validate in the status bar?

7. Correct any errors in the record. Repeat the validate command.
   a. What is the value for Validate in the status bar?

8. Add your holdings to the record. What steps did you take to perform this action?

9. Remove your holdings from the record. What steps did you take to perform this action?
**Documentation**

**Quick Reference: Cataloging in Connexion Client**
https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_3.0/Reference/Quick_reference_Cataloging_in_Conexion_client

**Edit Bibliographic Records**
https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_3.0/Cataloging/Edit_bibliographic_records

**Take Actions on Bibliographic Records**
https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_3.0/Cataloging/Take_actions_on_bibliographic_records

**Function Key Template for OCLC Connexion Client**
http://www.oclc.org/content/dam/support/connexion/documentation/client/gettingstarted/keyboaridtemplate.pdf

**Bibliographic Formats and Standards:**  https://www.oclc.org/bibformats/en.html

**Check your answers**

1. With a record displayed, what is the best way to locate information about a field?
   C. Right click in the field and select MARC field help from the list presented

2. The Edit, Add, and Delete commands used to modify information in a record are not reversible.
   False

3. What is the purpose of Update holdings?
   C. This command adds your OCLC symbol to a bibliographic record in WorldCat

4. What is an important reason to use Delete holdings?
   C. This ensures that ILL staff will not receive requests for items removed from your collection.

5. Match the keystroke to the command

<table>
<thead>
<tr>
<th>Command</th>
<th>Keystroke shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Holdings</td>
<td>F8</td>
</tr>
<tr>
<td>Delete Holdings</td>
<td>Shift + F8</td>
</tr>
<tr>
<td>Export Record</td>
<td>F5</td>
</tr>
<tr>
<td>Insert a blank field</td>
<td>Enter</td>
</tr>
<tr>
<td>Insert a delimiter</td>
<td>Ctrl + D</td>
</tr>
</tbody>
</table>
Test your skills

1. Search **#1012647794** in the quick search box.

2. Right Click in the appropriate field, then choose MARC Field Help from the menu.
   a. Field 015 National Bibliography Number
   b. Field 084 Other Classification Number
   c. Field 505 uses first indicator 2 to represent Partial Contents

3. To delete a field press Alt + Delete; right-click in the desired field, then click **Delete Field** in the drop/down list; or click **Edit > Cut Copy Paste > Delete Field**.

4. To create a blank field, press Enter. In the new blank field, type the desired data.

5. Navigate to the first indicator cell of the 300 field, then enter the desired data.
   To validate: press Shift+F5; Click the Validate button on the toolbar; or click **Edit > Validate**.  
   You should receive a validation error “300 occurrence 1, indicator 1 – invalid code” and an F next to “Validate” on the status bar.

6. Navigate to the first indicator cell of the 300 field, then delete the desired data.

7. Repeat procedure from step 6. This time, you should not receive an error message and should see a C next to “Validate” on the status bar.

8. To update holdings: press F8; click the Update Holdings button on the toolbar; or click **Action > Holdings > Update Holdings**.

9. To delete holdings: press Shift+F8; click the Delete Holdings button on the toolbar or click **Action > Holdings > Delete Holdings**.