

## Create Bibliographic Records

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<b>Revision History Date</b>	<b>Section title</b>	<b>Description of changes</b>
May 2004	<ol style="list-style-type: none"> <li>1. Use save file</li> <li>2. Search save file</li> <li>3. View and use save file results</li> <li>5. Status list screen</li> </ol>	Updated to add information on the new Review status category used for retrieving records submitted for review by other institutions.
August 2004	<ol style="list-style-type: none"> <li>3. View and use save file results</li> <li>4. Show flagged SF records</li> </ol>	Revised to reflect enhanced functionality for actions on saved records; export.
June 2005	<ol style="list-style-type: none"> <li>1. Use save file</li> </ol>	Minor clarification on record aging.
November 2005	<ol style="list-style-type: none"> <li>2. Search AF save file</li> </ol>	Added list of stopwords for searching the authority save file.
October 2018	<ol style="list-style-type: none"> <li>2. Search AF save file</li> </ol>	Updated Authority Save File indexes
May 2021	Entire document	Removed all references to master record.
October 2023	Entire document	Removed all remaining references to the metadata extraction feature.

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## Create Bibliographic Records

### 1. Create a bibliographic record

#### About new bibliographic records

- The system assigns an OCLC control number to each new record; the same number uniquely identifies the record in WorldCat.
- You can retrieve bibliographic records by searching WorldCat.
- WorldCat validation rules are applied to new records.
- You cannot export a new record not yet added to WorldCat; only records with OCLC control numbers can be exported.

#### Review guidelines for new records

You should be familiar with the guidelines found in [Bibliographic Formats and Standards chapter 4: When to Input a New Record](#).

#### Check for and review existing records

Before creating a new record, by any method, search WorldCat for existing records that describe the item.

Search using various search strategies (author, title, publisher, URL, or other methods based on distinctive information you have).

If you find	Then
Record exactly matching the item you are describing	<ul style="list-style-type: none"><li>• Use the record as is (for example, to set holdings or to export). Or</li><li>• Edit (revise) an existing record to correct or expand information about the item.</li></ul>
Record nearly matching the item you are describing	Derive a new record to reuse information that applies to the item you are describing and then revise the derived record as needed.
No matching records	Create a new record.

#### Create record

You can create a bibliographic record in three ways:

- Derive a new record from an existing record and modify content as necessary (save keystrokes by reusing appropriate data).
- Enter content for each field in a blank workform.
- Begin with fields extracted or generated from the Web page for the item (extracting).

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## Create Bibliographic Records

### Constant data

- To save keystrokes when creating or revising records, create **constant data records**. In each constant data record, enter notes and other data you use frequently when creating or editing a particular category of bibliographic record. For details on creating and using constant data, search Help for the topic **constant data**.
- If you derive a new record from an existing record or create a record from a blank edit view (workform), use the **Apply Default CD** action to incorporate constant data. Or use **Apply CD By Name** or **Apply CD From List** to retrieve and apply a stored constant data record.
- If you create a bibliographic record by extracting metadata from a Web resource, you can choose to merge your default constant data with the extracted/generated information Connexion supplies in the base record.

### Add record or save for later completion

#### Add record to WorldCat

- Finish editing the new record and validate it. Correct any validation errors.
- **Prevent duplicate records.** Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the item since you began working on your record.
- If you find no existing record, take the **Update Holdings** or **Produce and Update Holdings** or **Alternate Produce and Update** action to add it to WorldCat and set your library's holdings.

#### Save record

- Take the **Save Record** action to place the record in the bibliographic save file for further review and/or editing. **Caution**
- If you log off without saving the new record or adding it to WorldCat, your record is lost.

## 2. Create bibliographic record from a workform

### Why use a workform?

- Catalog an item in any bibliographic format.
- Describe an electronic resource whose content is not in HTML, such as a collection of Portable Document Format (PDF) files, image files, or audio files.

### Use a workform to create a new bibliographic record

Action
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## Create Bibliographic Records

1	<p>Before creating a new record, search WorldCat for existing records that describe the item.</p> <p>You can search WorldCat using various search strategies based on distinctive information you have. Or If cataloging a Web-based item, use the option on the Create Record screen to search WorldCat for the URL of the item before accessing the site to create a record.</p>
2	<p>On the Cataloging tab, under Create Options, click <b>Single Record</b>. The Create Record screen appears.</p>
3	<p>At the top of the screen, check the format shown in the text box (MARC Template or MARC Text Area or DC Template or DC Text Area). To change the record format, open the list and click the format you want to use.</p>
4	<p>Select the option button labeled <b>Use the [ ] workflow</b>. Open the list of workflows and click the workflow you want to use.</p> <p><b>Record format determines workflows available</b></p> <ul style="list-style-type: none"> <li>• <b>MARC format:</b> Books, Computer Files, Maps, Mixed Materials, Scores, Serials, Sound Recordings, Visual Materials</li> <li>• <b>Default MARC workflow:</b> Books</li> <li>• <b>Dublin Core format:</b> Collection; Collection, instructional; Computer file; Computer software; Electronic journal; Electronic online service; Image data/ Image data, moving; Map data; Map data, manuscript; Physical object; Sound data, musical; Sound data, nonmusical; Text data; Text data, manuscript; Text data, music; Text data, music manuscript</li> <li>• <b>Default Dublin Core workflow:</b> Text data</li> </ul>
5	<p><b>(Optional) Apply Default Constant Data</b> To merge content from your default constant data record into the workflow, select the check box labeled <b>Apply Default Constant Data</b>. <b>Default setting:</b> Check box not selected; The system does not add default constant data.</p>
6	<p>Click <b>Create</b>. A blank workflow of the type you selected appears.</p> <p><b>MARC workflows</b> contain the following default variable fields based on your cataloging profile:</p> <ul style="list-style-type: none"> <li>• Empty call number field appropriate for your profiled classification scheme. One of the following fields is inserted: 055, 070, 080, 086, 090, 092, and 096.</li> <li>• Field 040 containing your institution symbol is subfields Ꞥa and Ꞥc.</li> <li>• Field 049 containing your default holding library code.</li> </ul>
<b>Action</b>	
7	<p>Enter content to create an accurate description of the item.</p> <p>If appropriate, apply constant data to the new record.</p> <ul style="list-style-type: none"> <li>• On the Edit list click <b>Apply Default CD</b> to apply your default constant data. Or</li> <li>• On the Edit list click <b>Apply CD By Name</b> or <b>Apply CD From List</b> to apply a specific constant data record.</li> </ul>

## Create Bibliographic Records

8	<p>Add the record to WorldCat. Go to step 9 for instructions.</p> <p>Or</p> <p>Save the record for further processing and/or review.</p> <ol style="list-style-type: none"><li>1. Open the Action list and click <b>Save Record</b> to add the record to the bibliographic save file.</li><li>2. Assign a workflow status appropriate for the record's position in your cataloging workflow.</li><li>3. If desired, enter a note or identifier in the My Status text box.</li><li>4. When you save the record, the system assigns the source status <b>Workform</b>.</li></ol>
9	<p>Add the new record to WorldCat.</p> <p><b>Prevent duplicate records</b></p> <ul style="list-style-type: none"><li>• Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the item since you began working on your record.</li></ul> <p><b>Add record</b></p> <ul style="list-style-type: none"><li>• If you find no existing record, open the Action list and click <b>Update Holdings</b> or <b>Produce and Update Holdings</b> or <b>Alternate Produce and Update</b>.</li></ul> <p><b>Results</b></p> <ul style="list-style-type: none"><li>• Connexion validates the record. If the system reports validation errors, correct them and retry adding the record.</li><li>• When the record is valid, Connexion adds it to WorldCat, sets your holdings, and assigns an OCLC control number.</li><li>• Your copy of the record is displayed in local edit mode. Local data fields you added to the record are retained in your copy. <b>Notes: Adding saved record</b></li><li>• <b>Saved record deleted after add.</b> If you retrieved the new record from the save file, the system deletes the record from the save file after adding it to WorldCat. Resave the record if you need to keep it in the save file for further processing.</li><li>• <b>Save file numbers reused.</b> When you resave the record, the system may assign the (reused) slot number previously used for the deleted record.</li><li>• <b>Flag removed.</b> However, any flag on the deleted record is lost. To include the resaved record in a group flagged for further processing, you must reflag the resaved record.</li></ul>

## Optional: Use RDA-based workforms

Default workforms for creating bibliographic records are based on Anglo-American Cataloging Rules (AACR2). You can choose instead to use workforms based on Resource Description and Access (RDA) by setting an option in **General tab > Preferences > RDA Options**.

Once you set the option, when you click **Cataloging tab > Create Options > Single Record**, and the Create Record screen opens, a confirmation label, **Using RDA Workforms**, appears below the **Apply default constant data** check box.

If you use RDA workforms, you can also set an option in the RDA Options in Preferences to enable showing RDA field descriptions for variable fields. You must be an RDA subscriber and enter your RDA Toolkit logon information in the RDA Options screen.

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## Create Bibliographic Records

Once you set the option and enter your information, to see an RDA Toolkit field description:

- With the cursor in a variable field, click **RDA Toolkit** in the **Functions** list for the field.

Notes about the Toolkit:

- If you are not a subscriber but you are interested in subscribing, see details at the [RDA Toolkit Subscribe](#) webpage.
- For general information, see the [RDA Toolkit](#) webpage.
- For more about RDA cataloging, see [Information and Resources in Preparation for RDA](#).

## Constant data

To save keystrokes when creating or revising records, create **constant data records**. In each constant data record, enter notes and other data you use frequently when creating or editing a particular category of bibliographic record. For details on creating and using constant data, search Help for the topic **constant data**.



## Create Bibliographic Records

### 3. Create new bibliographic record from an existing record

#### Why derive a new record?

- Reuse applicable content from a record that describes an item similar to the one you are cataloging.
- Save keystrokes and reduce errors.

#### Derive new bibliographic record from retrieved record or workflow

	Action
1	<p>Retrieve a record that describes an item that resembles or is related to the item you are cataloging. You can also derive a new record from an edited or unedited workflow.</p> <p>View the full record.</p>
2	<ol style="list-style-type: none"><li>1. On the Edit list click <b>Derive New Record</b> or press &lt;Alt&gt;&lt;K&gt; and then &lt;D&gt; (or &lt;Alt&gt;&lt;J&gt; and then &lt;D&gt;).</li><li>2. When the system asks whether you want to transfer fixed-field values to the new record:<ul style="list-style-type: none"><li>• Click <b>Yes</b> to transfer all fixed-field values except the OCLC control number, <b>Rec Stat</b>, <b>Entered</b>, and <b>Replaced</b>. <b>Rec Stat</b> is set to Q (New). Both <b>Entered</b> and <b>Replaced</b> are set to the current date.</li><li>• Click <b>No</b> to transfer only default fixed-field values for the format, as indicated by the value in the <b>Type</b> element.</li><li>• Click <b>Cancel</b> to cancel deriving a new record. <b>Results</b></li></ul></li></ol> <p>The system displays the content of the new record. Variable fields transfer based on your settings for the <b>Derive Record Fields</b> option (Cataloging Operations screen). <b>NEW</b> appears in place of an OCLC control number.</p>
3	<p>Edit the record to describe the item you are cataloging. If appropriate, change the MARC format for the new record to match the item you are cataloging.</p> <ul style="list-style-type: none"><li>• Select the desired format from the list in the fixed-field area of the record. If appropriate, apply constant data to the new record.</li><li>• On the Edit list click <b>Apply Default CD</b> to apply your default constant data. Or</li><li>• On the Edit list click <b>Apply CD By Name</b> or <b>Apply CD From List</b> to apply a specific constant data record.</li></ul>
4	<p>Add the record to WorldCat. Go to step 5 for instructions.</p> <p>Or</p> <p>Save the record for further processing and/or review.</p> <ol style="list-style-type: none"><li>1. Open the Action list and click <b>Save Record</b> to add the record to the bibliographic save file.</li><li>2. Assign a workflow status appropriate for the record's position in your cataloging workflow.</li><li>3. If desired, enter a note or identifier in the My Status text box.</li><li>4. When you save the record, the system assigns the source status <b>Derived</b>.</li></ol>

## Create Bibliographic Records

Action	
5	<p>Add the new record to WorldCat.</p> <p><b>Prevent duplicate records</b></p> <ul style="list-style-type: none"><li>• Search WorldCat again immediately before adding the new record to verify that no other user has created a record for the resource since you began working on your record.</li></ul> <p><b>Add record</b></p> <ul style="list-style-type: none"><li>• If you find no existing record, open the Action list and click <b>Update Holdings</b> or <b>Product and Update Holdings</b> or <b>Alternate Produce and Update</b>.</li></ul> <p><b>Results</b></p> <ul style="list-style-type: none"><li>• Connexion validates the record. If the system reports validation errors, correct them and retry adding the record.</li><li>• When the record is valid, Connexion adds it to WorldCat, sets your holdings, and assigns an OCLC control number.</li><li>• Your copy of the record is displayed in local edit mode. Local data fields you added to the record are retained in your copy. <b>Notes: Adding saved record</b></li><li>• <b>Saved record deleted after add.</b> If you retrieved the new record from the save file, the system deletes the record from the save file after adding it to WorldCat. Resave the record if you need to keep it in the save file for further processing.</li><li>• <b>Save file numbers reused.</b> When you resave the record, the system may assign the (reused) slot number previously used for the deleted record.</li><li>• <b>Flag removed.</b> However, any flag on the deleted record is lost. To include the resaved record in a group flagged for further processing, you must reflag the resaved record.</li></ul>

## Content transferred to derived record

**Variable fields: default.** Connexion transfers and/or supplies the following variable fields to the new record:

- MARC fields with tag numbers from 1xx to 8xx.
- MARC field 040: subfields **a** and **c** containing the OCLC symbol of the institution that derives the record.
- Default variable fields based on your cataloging profile:
  - Empty call number field appropriate for your profiled classification scheme. One of the following fields is inserted: 055, 070, 080, 086, 090, 092, or 096.
  - Field 049 containing your default holding library code.
- Links to controlled headings.

**Fixed field: default.** Connexion transfers default fixed-field values for the format, as indicated by the value in the **Type** element, with the following exceptions and modifications:

- Values for Type and Bvl match values in the source record.
- Srce is set to G.

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## Create Bibliographic Records

- DtSt for nonserials is set to a fill character (■) and Date1 is set to 4 fill characters. Date2 is set to 4 blanks. In DC views, DtSt is set to Q; both Date1 and Date2 are set to XXXX.
- DtSt for serials (records with BIV √) is set to F. Date1 is set to 4 fill characters; Date2 is set to 9999. In DC views, DtSt is set to X; both Date1 and Date2 are set to XXXX.
- In MARC views, ELvl is set to a fill character (■). In DC views, ELvl is set to \_ .

## User options (MARC only)

- **Variable fields.** You can select which variable fields to transfer. You can add fields to the set transferred by default and/or remove fields from the default list. To select variable fields, use the **Derive Record Fields** option (Cataloging Options screen)
- **Fixed field.** Each time you derive a new record, you can decide whether to transfer only default fixed-field values or to transfer all fixed-field values from the base record except the OCLC control number, **Rec Stat**, **Entered**, and **Replaced**.

## Connexion does not transfer or supply:

- OCLC control number: The word NEW replaces the control number.
- Fixed-field elements **Rec Stat**, **Entered**, and **Replaced**. **Rec Stat** is set to Q (New); **Entered** and **Replaced** are set to the current date.
- Holdings data attached to a bibliographic record.
- MARC fields in the 01x tag group: 010, 012, 013, 015, 016, 017, 018, and 019.
- MARC fields 029, 042, 066, 850, 886, 887, 938, 956, and 987.

## Tip: Review transferred fixed-field values

- If you choose to transfer all fixed-field values to the new record, review the resulting record carefully.
- In particular, verify that the values for **ELvl**, **Srce**, **DtSt**, and **Dates** are appropriate for the item you are cataloging.

## Tip: Derive from record in another language

- Review content for text transferred from the original record that requires translation to match the language of the deriving library.
- For example, descriptive content, notes, and subject headings may require translation.
- You may retain subject headings in the language of the base record. However, consider adding headings in the language best suited for likely users of the record.

## Constant data

To save keystrokes when creating or revising records, create **constant data records**. In each constant data record, enter notes and other data you use frequently when creating or editing a particular category of bibliographic record. For details on creating and using constant data, search Help for the topic **constant data**.

## 4. New bibliographic records: Details

### MARC fixed field default values

The table lists values supplied for fixed-field (008) elements in workforms. Connexion also supplies these defaults when you change the record type (Type) in a record. When you add an 006 field (MARC views only), Connexion supplies the defaults for the Type of 006 you specify. For example, you will see these default values in records that you create or modify in the following ways:

- Use the Extract Metadata function (Cataloging tab, Create Options, Extract Metadata) to create preliminary bibliographic records by extracting content from electronic resources.
- In a bibliographic record in MARC view, select a record type from the list labeled Fixed Field. Or, on the Create Record screen (Cataloging tab, Create Options, Single Record), choose a MARC view and then select a workform.
- In a bibliographic record in Dublin Core view, specify OCLC Genre (OCLCg) as the scheme for the Type element and then use the list of genres to specify the category of resource. Or, on the Create Record screen (Cataloging tab, Create Options, Single Record), choose a Dublin Core view and then select a workform. In MARC view, Connexion maps the OCLC Genre term to a MARC record type and supplies the appropriate fixed field values.
- **Note: Default values in DC view.** The following table lists MARC default values only. The default values supplied in DC view differ. To see how the DC values are mapped to MARC, create a workform in DC view and then switch to MARC.
- In the table, the following conventions are used: an **empty cell** means that the element is not applicable to a MARC format; an **uppercase B** represents a blank character; and a **vertical bar** represents a fill character.

Mnemonic	Name	BKS	CNR	VIS	MIX	MAP	SCO	REC	COM
AccM	Accompanying Matter						BBB BB	BBB BB	
Alph	Original Alphabet or Script of Title		B						
Audn	Target Audience	B		B			B	B	B
Biog	Biography	B							
BLvl	Bibliographic Level	m	s	m	c	m	m	m	m
Comp	Form of Composition						uu	uu	
CNR	Conference Publication								
Cont	Nature of Contents	BBB B	BBB						
CrTp	Type of Cartographic Material					a			
Ctrl	Type of Control	B	B	B	B	B	B	B	B
Ctry	Country of Publication, Etc.								

## Create Bibliographic Records

Dates	Date 1 Date 2	III BBB B	III 999 9	III BBB B	III BBB B	III BBB B	III BBB B	III BBB B	III BBB B
Desc	Descriptive Cataloging Form								
DtSt	Type of Date/Publication Status		c						
ELvl	Encoding Level								
<b>Mnemonic</b>	<b>Name</b>	<b>BKS</b>	<b>CNR</b>	<b>VIS</b>	<b>MIX</b>	<b>MAP</b>	<b>SCO</b>	<b>REC</b>	<b>COM</b>
Entered	Date Entered	System supplies current date							
EntW	Nature of Entire Work		B						
Fest	Festschrift	0							
File	Type of Computer File								u
FMus	Format of Music						u	n	
Form	Form of Item	B	B	B	B	B	B	B	
Freq	Frequency								
GPub	Government Publication	B	B	B		B			B
Ills	Illustrations	BBB B							
Indx	Index	0				0			
Lang	Language Code	III	III	III	III	III	III	III	III
LitF	Literary Form	0							
LTxt	Literary Text for Sound Recordings						nB	BB	
MRec	Modified Record Code	B	B	B	B	B	B	B	B
OCLC	OCLC Control Number	System supplies NEW							
Orig	Form of Original Item		B						
Part	Music Parts						B	n	
Proj	Projection					BB			
Rec stat	Record Status	n	n	n	n	n	n	n	n
Regl	Regularity								
Relf	Relief					BBB B			
Replaced	Date of Last Replaced	System supplies current date							
S/L	Successive/Latest Entry		0						
SpFm	Special Format Characteristics					BB			
Srce	Cataloging Source of Code	d	d	d	d	d	d	d	d
SrTp	Type of Serial		B						
Time	Running Time (1)			III					

## Create Bibliographic Records

Tech	Technique			n					
TMat	Type of Material			l					
TrAr	Transportation and Arrangement						B	n	
Type	Type of Record	a	a	g	p	e	c	j	m

### Footnote

(1) Mandatory for motion pictures and videorecordings. Use nnn for other media.

## OCLC Genre terms and MARC fixed field values

OCLC Genre term (OCLCg)	OCLC fixed field Type and coded value	Other fixed field values
Collection	Mixed Materials (MIX) p	
Collection, instructional	Visual Materials (VIS) o	TMat: b

OCLC Genre term (OCLCg)	OCLC fixed field Type and coded value	Other fixed field values
Computer file	Computer File (COM) m	
Computer software	Computer File (COM) m	File: b
Electronic journal	Continuing Resource (CNR) a	BLvl: s S/L: 0
Electronic online service	Computer File (COM) m	File: j
Image data	Visual Materials (VIS) k	TMat: i
Image data, moving	Visual Materials (VIS) g	TMat: v
Map data	Map (MAP) e	
Map data, manuscript	Map (MAP) f	
Physical object	Visual Materials (VIS) r	TMat: r
Sound data, musical	Sound Recording (REC) j	

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**Create Bibliographic Records**

Sound data, nonmusical	Sound Recording (REC) i	
Text data	Books (BKS) a	BLvl: m
Text data, manuscript	Books (BKS) t	
Text data, music	Scores (SCO) c	
Text data, music manuscript	Scores (SCO) d	
Text data, updating	Continuing Resource (CNR) a	BLvl: i S/L: 2 Form: s

## 5. Import bibliographic or authority records

### Why import records?

- Contribute bibliographic or authority records created in your library's local system.
- Process bibliographic records from OCLC offline services: PromptCat, Bibliographic Record Notification, GovDoc, or WorldCat Collection Sets.

### Records you can import

- Bibliographic or authority records:
  - MARC format only (OCLC-MARC or MARC21).
  - Exported from a local system. Export the records to a file via your system's MARC export function.
- Bibliographic records received from OCLC offline services: PromptCat, Bibliographic Record Notification, GovDoc, or WorldCat Collection Sets.
- OCLC bibliographic records (records that contain an OCLC control number in the 001 field) from offline products or from your local system.
- **Note: Use imported OCLC bibliographic records.**
  - You can take most actions on imported OCLC bibliographic records, including: Derive New Record, Export, Update Holdings, and Validate.
  - **Cannot delete holdings.** Imported OCLC records do not contain the indication that the item is Held or Not Held by your library. You cannot take the Delete Holdings action on imported records. To view holdings for the item, take the Display Holdings action.
  - **Caution: Lock and Replace.** If you use an imported OCLC bibliographic record to lock the corresponding WorldCat record, Connexion locks and displays the current version of the WorldCat record, overwriting any changes you made to the imported record. The system warns you that your changes will be lost and asks whether you want to continue.
- OCLC authority records (records that contain an OCLC Authority Record Number (ARN)) exported from your local system or supplied via the OCLC MARS service.
  - **Record actions: Derive only.** To use an imported OCLC authority record, you must first take the Derive New Record action. You cannot take other actions on the imported record. After completing the derived record, you can take any action, including: Export Record, Submit Record for Review, and Add Record.
  - **Cannot validate.** Imported OCLC authority records do not pass validation in Connexion browser. Internal dates in imported authority records do not match the system date. You cannot correct this problem by modifying the record. To use the content of the imported record within Connexion, derive a new record from it; the derived record does not contain the mismatched internal date.
  - **Caution: Lock and Replace.** If you use an imported OCLC authority record to lock the corresponding WorldCat record, Connexion locks and displays the current version of the



## Create Bibliographic Records

WorldCat record, overwriting any changes you made to the imported record. The system warns you that your changes will be lost and asks whether you want to continue.

- Non-OCLC bibliographic records
  - Imported as new records (workforms).
  - On these records, you can take any actions that are available for bibliographic workforms generated within Connexion.
- Non-OCLC authority records
  - Imported as new records (workforms).
  - On these records, you can take any actions that are available for authority workforms generated within Connexion.

## About import files

Property	Requirements and notes
Format	OCLC-MARC or MARC21 only.  <b>Caution:</b> <ul style="list-style-type: none"><li>• <b>Non-MARC files.</b> If you try to import from a non-MARC file (e.g., a file with the extension .doc, .xls, .mdb, .msg, .gif, .jpeg, or .tif), Connexion displays an error message.</li><li>• <b>File with corrupt or fragmented MARC records.</b> If you try to import from a corrupted file of MARC records, or a file that contains some MARC data, the system cannot process the file. If the browser is inactive for more than 5 minutes, click the <b>Stop</b> button. Then check the file for problems before retrying import.</li></ul>
Record types	Bibliographic records Authority records
Size	No prescribed maximum for file size (KB or MB).  Connexion imports records in groups of 100, pausing after each group to ask you to confirm that you want to continue.  Maximum number of records you can import depends on the number of records currently in your bibliographic or authority save file. Save files can contain up to 9,999 records.
Location	<ul style="list-style-type: none"><li>• Disk: Hard disk or network drive connected to local workstation.</li><li>• URL: Public Web server. Connexion must be able to retrieve the file via an HTTP request.</li></ul> <b>Note: No FTP support.</b> Due to security measures, the import function cannot retrieve files via FTP; only the HTTP protocol is supported.

## Prepare to import records

	Action
1	Select and/or set up the location (local drive or URL) for files of records to import.

## Create Bibliographic Records

2	Create or retrieve file of records to import. <ul style="list-style-type: none"><li>• Export bibliographic or authority records from OCLC software or from your local system. Or</li><li>• Retrieve a file of bibliographic records received from your OCLC cataloging service (PromptCat, Bibliographic Record Notification, GovDoc, or WorldCat Collection Sets).</li></ul>
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Action	
3	Move the file of records to the local drive or upload to the Web server.
4	(Optional) Decide whether to apply constant data or insert My Status notes in the imported records: <ul style="list-style-type: none"><li>• Bibliographic records<ul style="list-style-type: none"><li>○ <b>Apply default constant data.</b> Verify that your current default authority constant data record is appropriate. Edit the default CD record or designate another CD record as your default authority CD. Change the Fields to Apply setting if desired.</li><li>○ <b>Include My Status note.</b> When importing records from an OCLC service, select the My Status option and specify the appropriate record type. For other records, leave the record type box empty. For any group of imported records, assign a distinctive My Status note to help you manage the records in the bibliographic save file.</li></ul></li><li>• Authority records<ul style="list-style-type: none"><li>○ <b>Apply default constant data.</b> Verify that your current default authority constant data record is appropriate. Edit the default CD record or designate another CD record as your default authority CD. Change the Fields to Apply setting if desired.</li></ul></li></ul>

## Import bibliographic or authority records

Action	
1	Log on to Connexion browser.
2	On the Cataloging tab or the Authorities tab, under Create Options, click <b>Import Records</b> .
3	Specify the records to import.  Under <b>Type of Records to Import</b> : <ul style="list-style-type: none"><li>• Select <b>Import Bibliographic Records</b> to import bibliographic records only. Or</li><li>• Select <b>Import Authority Records</b> to import authority records only. Or</li><li>• Select <b>both</b> check boxes if the file contains both bibliographic and authority records and you want to import both record types at once.</li></ul>

## Create Bibliographic Records

4	<p>Specify the file location.</p> <p>Under <b>File Location</b>:</p> <ul style="list-style-type: none"><li>• In the <b>Disk</b> text box, type the full path (drive letter, folder, and file name) for an import file on a local hard disk or network drive. Or click the <b>Browse</b> button to navigate to the location. Or</li><li>• In the <b>URL</b> text box, type the URL for an import file located on a Web server. <b>Note:</b> You must specify the URL using the HTTP protocol, beginning with <b>http://</b> <b>Note:</b></li><li>• Below each text box, the screen shows the location from which you last imported records.</li><li>• Specify <b>either</b> a disk location or a URL. If you click <b>Import</b> with text in both boxes, an error message appears.</li></ul>
<b>Action</b>	
5	<p>(Optional) Apply default constant data</p> <p>Under Import Bibliographic Records or Import Authority Records:</p> <ul style="list-style-type: none"><li>• Select the <b>Apply Default Constant Data</b> check box to apply your default constant data record to imported bibliographic records and/or authority records. Or</li><li>• Clear the check box to import records without applying constant data.</li></ul>
6	<p>(Optional) Assign My Status to bibliographic records</p> <p>Under My Status for Bibliographic Records:</p> <ul style="list-style-type: none"><li>• <b>Type.</b> For records from OCLC offline services, select the service that supplied the records you plan to import. For other records, leave the Type box empty.</li><li>• <b>Identifier box.</b> For any bibliographic record, type a distinctive note to help you retrieve and manage imported records in the bibliographic save file.</li></ul>

## Create Bibliographic Records

7	<p>Click <b>Import</b>.</p> <p><b>Results</b></p> <ul style="list-style-type: none"><li>• Connexion imports the specified records, beginning with the first record in the file.</li><li>• The system adds the records to the bibliographic save file and/or the authority save file with the source status <b>Imported</b>.</li><li>• Non-OCLC records are imported as OCLC workforms.</li><li>• Based on the options you select, the system applies default constant data and/or inserts My Status notes (bibliographic records only).</li><li>• After importing all specified records, Connexion displays a results screen that gives totals for bibliographic and/or authority records and reports actions taken on the records.</li></ul> <p><b>More than 100 records in file</b></p> <p>If the import file contains more than 100 records:</p> <ol style="list-style-type: none"><li>1. Connexion imports the first 100 records.</li><li>2. The system displays a status screen and asks you to confirm that you want to continue importing records. Click <b>OK</b> or press &lt;Enter&gt; to continue importing with the next record in the file.</li><li>3. After importing each group of 100 records, the system again pauses and asks you to click <b>OK</b> or press &lt;Enter&gt; to continue.</li></ol>
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## Imported records: Details

- All imported records are assigned the source status **Imported**.
- MARC21 records are converted to OCLC-MARC.
- Non-OCLC records are converted to workforms.
- The following table gives details on changes Connexion makes automatically during the import process.

Record type	OCLC record	Non-OCLC record
Bibliographic	<ul style="list-style-type: none"><li>• Workflow status: In process</li><li>• Save file expiration date: 14 days</li><li>• OCLC control number retained is 001.</li><li>• If Lang in fixed field is 3 blanks, change to zxx (No linguistic content).</li><li>• If record contains 533 \$7, convert the data to a 539 field.</li><li>• Delete field 994 if present.</li></ul>	<ul style="list-style-type: none"><li>• Workflow status: New</li><li>• Save file expiration date: 28 days • NEW in 001.</li><li>• Entered date replaced with current date.</li><li>• RecStat value set to n.</li><li>• Default 040 field inserted.</li><li>• If Lang in fixed field is 3 blanks, change to zxx (No linguistic content).</li><li>• If records contains 533 \$7, convert the data to a 539 field.</li></ul>

## Create Bibliographic Records

Authority	<ul style="list-style-type: none"><li>• Workflow status: In process</li><li>• Save expiration date: 90 days</li><li>• ARN retained in 001.</li></ul>	<ul style="list-style-type: none"><li>• Workflow status: New</li><li>• Save file expiration date: 90 days</li><li>• NEW in 001.</li><li>• Entered date replaced with current data.</li><li>• RecStat value set to n.</li><li>• EncLvl value set to n.</li><li>• Default 040 field inserted.</li><li>• Fields deleted: 002, 003, 004, 005, 009, 010, and 035.</li></ul>
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## Find imported bibliographic records

Action
<p><b>Show by Status screen</b></p> <p>On the Cataloging tab, under Show Options, click <b>By Status</b>.</p> <ol style="list-style-type: none"><li>1. At the status list screen, under Show Save File, Source Status, select the check box for the <b>Imported</b> status.</li><li>2. Then click <b>Show Records</b> or press &lt;Enter&gt;. Or</li></ol> <p><b>Search Save File screen</b></p> <p>On the Cataloging tab, under Search Options, click <b>Save File</b>.</p> <ul style="list-style-type: none"><li>• Search for Imported status. On the Search Save File screen, at the bottom of the search form, open the Source Status list and click Imported.</li><li>• Search for My Status text. In the Search for box, type the text you supplied on the Import Records screen. You can search for any whole word in the note. Search for the Type only (if specified), for any word in the free-text Identifier, or for the complete My Status note (Type plus user-defined note).</li><li>• Then click <b>Search</b> or press &lt;Enter&gt;.</li></ul>

## Find imported authority records

Action
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## Create Bibliographic Records

### Show by Status screen

On the Authorities tab, under Show Options, click **By Status**.

1. At the status list screen, under Show Save File, select the check box for the **Imported** status.
2. Then click **Show Records** or press <Enter>.

Or

### Search Authorities Save File screen

On the Authorities tab, under Search Options, click **Save File**.

- On the Search Save File screen, at the bottom of the search form, open the **with Status** list and click **Imported**.
- Then click **Search** or press <Enter>.