

## Authorities: Save Authority Records

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## Revision History

<b>Date</b>	<b>Section title</b>	<b>Description of changes</b>
June 2005	1 Save authority records	Extending the 90-day expiration date by resaving online save file records, workforms, and locked records does not extend the lock on locked records.
	3 Use search results	Validation is available both online and offline
November 2005	2 Search for saved records	<ul style="list-style-type: none"><li>• Removed text related to Passport and CatME</li><li>• Added stopword list</li><li>• Can turn off warning message that appears when you change the local file in the Search Local Authority Save File dialog (Authorities &gt; Search &gt; Local Save File).</li></ul>
May 2021	1 Save authority records	Added note pointing to Connexion client version 3.0 documentation.

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## 1 Save authority records

**Note:** If you are using Connexion client version 3.0 or newer, see [Connexion client](#) for applicable documentation.

**Save online or save to local file** Using the Connexion client, you can save authority records to the online save file or to one or more local files located on your workstation or a shared network drive. The client provides a blank default local save file (**DefaultAuth.auth.db**). See more about local files, their locations, and how to share them in Basics, Get Support, “User data files (back up or share) and program files.”

This topic covers procedures for saving records to both the online and local save files.

**About authority save files** **What are authority save files?**

*Online save file:*

- The online authority save file is a working storage area for use when you complete new authority records or modify existing records from the Authority File.
- Each library's saved records are available to users from that library only.
- There is only one online authority save file. It is accessed by both Connexion interfaces, the browser and the client.
- A library can store up to 9,999 records in the authority save file. The system prevents you from exceeding the limit.
- When saved, each record is assigned a sequential number. The first number assigned is 1.

*Local save file:*

- The local authority save file is located on your workstation or can be located on a network drive for shared access. You can use the local files to save authority records and work on them offline or online, to enter Authority File searches or set actions on records to run in batch mode.
- The Connexion client automatically creates a default local authority save file when you install the software. The path and file name is:

**X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Db\DefaultAuth.auth.db** (X is the letter of your hard drive)

- You can create multiple local authority save files on your workstation or on a shared drive for special cataloging tasks or for use by individual staff members.
- You can designate/change the default. And you can move or copy records from one local file to another. For more about local save files, see Basics, Manage Local Files, “Manage local files.”

**Maximum number of records in an online or local save file: 9,999.** The system prevents you from saving a record that would exceed the limit.

**Save file record numbering:** Whether saved to the online file or to the local file, each saved record is assigned a sequential number. The first number assigned is 1. After that, the client assigns the first available sequential number.

### Expiration of records, workforms, and locked records in online save file:

**Note:** Records saved in the local save file **do not expire**.

- **90-day limit for records.** Saved LC authority file records and saved authority workforms can remain in the online save file for 90 days. After that, the system deletes them automatically. You can resave workforms and records to re-set the 90-day expiration. However, resaving does not extend the lock on locked records (see note below).
- **Check expiration dates.** Check the number of days before expiration in the **Expires** column of a save file list or check the number in *Expires in [number of days]* in the record identification area of a full record. The system updates the number of days daily.

#### Notes:

- Occasionally, OCLC may delay purging the online save file. In this case, records may remain in your save file longer than expected.
- Locked WorldCat record unlocked when expired.** A locked WorldCat record in the save file is unlocked when the record expires. To reinstate the lock, you must retrieve a new copy of the WorldCat record and take the **Lock WorldCat Record** action (Action menu). If you edited the previous saved copy of the WorldCat record, your edits are lost.

### New records (NACO-affiliated libraries only), importing, and exporting

- **New records.** A newly created record is not automatically added to a save file. If you do not plan to complete the record and add it to the Authority File during your current session, save the record (**Action > Save Record to Online File** or **Save Record to Local File**).
- **Imported records.** The client assigns the workflow status **Imported** to all authority records you import, whether they are existing Authority File records (with ARNs) or workforms.
- **Exporting records.** You can only export a record from the online or local save file if the record has an OCLC record number (that is, has been added to the Authority File). You cannot export workforms.

**Recommendation:** The client automatically backs up local files. OCLC recommends keeping the automatic backup option. If a local file becomes unusable, you can recover the data by renaming the backup file to make it the current file.

See Basics/Manage Local Files, “Manage local files” for general information about using and managing local files.

**Save an authority record to the online or local file**

	Action
1	Retrieve an existing authority record, or create a new record, or select records in a list.
2	<p><b>Save online:</b> On the Action menu, click <b>Save Record to Online File</b>, or press &lt;Ctrl&gt;&lt;Alt&gt;&lt;V&gt;. (Must be logged on.)</p> <p>Or</p> <p><b>Save to local file:</b> On the Action menu, click <b>Save Record to Local File</b>, or press &lt;F4&gt;.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• If you save record(s) from a local file to the online save file or vice versa, the client prompts you to either delete or resave the record(s) in the original save file.</li> <li>• The holdings statement remains with record(s) saved to a local authority file, even though holdings may be added to the records online after you save locally. The client updates the holdings count in the local file records if you take an online action on them.</li> <li>• See more about backing up local files in Basics, Get Support, “User data files (back up or share) and program files.”</li> </ul> <p><b>Result:</b></p> <ul style="list-style-type: none"> <li>• When you save to the online save file: The system confirms that the record has been added and gives the save file number assigned to the record. The record closes.</li> <li>• When you save to the local save file: The client does not confirm that the record is saved but does leave the record open. The save file number is displayed in the record information area of the record.</li> </ul> <p>See more about actions you can take on records in the online and/or local save file in “Use authority save file search results.”</p>

**Resave after taking an action to keep record in online save file**

The system automatically deletes both workforms and existing records from the save file when you close the save file after taking the following actions A(ction menu):

- Add to Authority File (or <Ctrl><Alt><A>)
- Lock WorldCat Record (or <Alt><F8>)
- Replace Record (or <Alt><F10>)

If you want to keep records in the save file after doing one of these actions, you must resave.

**Note:** You can resave automatically from the Set Status dialog (**Action > Set Status**) by selecting the **Save Record** check box.


**System-assigned save file record numbers**

When an authority record is saved to the online save file or to a local save file, the system assigns it the lowest available save file record number for that file, including any numbers vacated by deleted records. Therefore, local save file record numbers can shift and may seem to be numbered out of sequence.

**Example:** You may have 50 records in the save file, but when you save the current record, it is not assigned the next sequential number, 51. Instead, it is assigned the

first available number, 10, the lowest available number which was previously assigned to a record that is now deleted.

**Delete an authority record from the save file**

	Action
1	Open an authority record you want to delete from either the online or local save file, or select records in a save file list.
2	<p>On the Action menu, click <b>Delete Record</b>, or click , or press &lt;Ctrl&gt;&lt;Alt&gt;&lt;D&gt;.</p> <p><b>Note:</b> When you take the actions listed in the section above on a save file record, the system automatically deletes the record from the save file. You must resave the record to keep it in the save file after you do one of these actions.</p>
3	Click <b>Yes</b> to confirm.

**Notes for local files:**

- If you maintain more than one local authority save file, you can copy or move records from one file to another.
- When you delete or move records from a local file, file size (number of bytes) does not change. To remove empty space in a local file, you can compact and/or repair local files after deleting or moving records (see Basics, Managing Local Files, “Compact/repair a local file”).
- To help you manage records, you can change workflow status and, for local authority save file records only, add a custom My Status.
  - Note:** My Status is available for local authority save file records only. It is unavailable for online authority save file records. The client lets you enter My Status data but does not save it with the record.
- Authority records have a default workflow status of **In Process** but no default My Status until you enter one or set a default for all local save file records (**Tools > Options > My Status**).
- If needed, for local file records that you marked with an action for batch processing, you can also delete the Ready status, removing the record(s) from batch processing.

**Change or assign workflow status or My Status or remove an action status**

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To change workflow status, assign a My Status, or remove an action status you marked for batch processing:

	<b>Action</b>
1	Retrieve a record from: <ul style="list-style-type: none"> <li>• The online authority save file (<b>Authorities &gt; Search &gt; Online Save File</b>)</li> <li>Or</li> <li>• The local save file (<b>Authorities &gt; Search &gt; Local Save File</b>).</li> </ul> Or Create a new authority record (see topics in Authorities, Create Name Authority Records). Or Select records in a save file list.
2	On the Action menu, click <b>Set Status</b> , or press <Alt><Shift><S>.
3	<p><b>My Status—available for local file records only.</b></p> <p>In the Set Status dialog, in the <b>Enter My Status Text</b> box, type a note or identifier in free text (limit: 40 characters).</p> <p><b>Tip:</b> You can assign your name as My Status for your local authority save file records, and then limit a search by My Status [your name] as an easy way to retrieve only your records from a shared local save file.</p>
4	In the Workflow Status list, select a workflow status. Available statuses are: <ul style="list-style-type: none"> <li>• Completed</li> <li>• In Process (default)</li> <li>• In Review</li> <li>• New</li> </ul>
5	Optional. Select the <b>Save Record</b> check box if you want to save the record at the same time you set the status(es). A check mark indicates that this option is selected.



	<b>Action</b>
6	<p>Optional.</p> <p>To remove the Ready status from record(s) you set an action on for batch processing (action status in the record's status bar is set to <b>R=Ready</b>):</p> <p>Select the check box for the action.</p> <p>Actions available for batch processing for authority records are:</p> <ul style="list-style-type: none"> <li>• Add</li> <li>• Export</li> <li>• Replace</li> <li>• Submit</li> </ul>
7	<p>Click <b>OK</b> or press &gt;&lt;Enter&gt; to assign, change, or remove the status(es), or click <b>Cancel</b> to cancel.</p> <p><b>Results:</b></p> <ul style="list-style-type: none"> <li>• The workflow status you selected and/or the My Status you entered display in the record's status bar and in the Workflow and My Status columns of the record list.</li> <li>• If you selected an action status to remove, the <b>R</b> (Ready) status is removed from the record's status bar and from the action column of the record list.</li> </ul> <p>Also, removes the record from inclusion in the next batch run, unless you mark for another action.</p> <ul style="list-style-type: none"> <li>• If you saved the record, the client asks if you want to save to the online file or to the local file.             <ul style="list-style-type: none"> <li>— If you save to the online file, the client closes the record and gives you its save file number.</li> <li>— If you save to the local file, the record remains open. The local save file number is displayed in the record information area.</li> </ul> </li> </ul>

**Set a default My Status or set My Status for records selected in a list**

There are two ways to save time by assigning the same My Status (for example, your name) to multiple local authority save file records at once:

- Set a default My Status. The client automatically supplies it for all records you save to the local authority save file.

Or

- Set My Status on multiple records you select in a local authority save file list.

**Note:** My Status is available for local authority save file records only. It is unavailable for online authority save file records. The client lets you enter My Status data but does not save it with the record.

To set a default My Status:

	Action
1	On the Tools menu, click <b>Options</b> , or press <Alt><T><O>, and then click the <b>My Status tab</b> .
2	Select the <b>Authority Records</b> check box, and in the text box, type a note or identifier in free text (limit: 40 characters) to apply to all local authority records you save.  <b>Tip:</b> For any particular record, you can change the default My Status if needed: On the Action menu, click <b>Set Status</b> or press <Alt><Shift><S>. Type over the highlighted default My Status in the <b>Enter My Status Text</b> box or edit the default My Status in <b>Tools &gt; Options &gt; My Status</b> to change for all records.
3	Click <b>OK</b> or press <Enter> to assign or change the status(es), or click <b>Cancel</b> to cancel.

**Note:** You can also set a default My Status for online and local bibliographic save file records, for online and local bibliographic constant data and for local authority constant data records.

To set a My Status for multiple local authority save file records selected in a list:

	Action
1	Select records in a local authority save file list:  Select adjacent records: Click to highlight the first entry, and then press and hold <Shift> and click the last entry. Or Select nonadjacent entries: Click to highlight the first entry, and then press <Ctrl> and click to highlight each additional entry.
2	Follow steps 2 through 6 in the procedure above for “Changing or assigning workflow status or My Status.”

**Statuses for saved authority records: overview**

- You or the system assigns record statuses only to assist you in managing and processing records you are using for cataloging.
- Status values are stored only in the working copy of a record saved in the online or local save file. (Exception: The client does not save the status for Report Error with the record.)
- Statuses are displayed in a record's status bar and in a save file list.
- If a saved authority record is locked, once you replace the WorldCat record with your edits (action available only to NACO-authorized libraries) or release the lock, the statuses are not retained in the WorldCat record.

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The following table lists the types of statuses, their purpose, and possible categories or values you or the system can assign:

Type of Status (supplied by)	Purpose	Categories/Values
<p>Action (The system supplies the status)</p>	<ul style="list-style-type: none"> <li>• Show actions taken on a record immediately while online</li> <li>• Show outcome of online actions (Completed or Failed)</li> <li>• Show local file records marked Ready for batch processing</li> </ul> <p>For a complete list of actions you can take on online and local save file records while logged on or offline, see "Use authority save file search results."</p>	<p><b>Actions:</b>  <i>Export</i>  <i>Add</i>  <i>Replace</i>  <i>Submit</i>  <i>Report Error</i> (not saved with record)  <i>Validate</i></p> <p><b>Outcomes:</b>  <i>C</i> (Completed)  <i>F</i> (Failed)  <i>R</i> (Ready)*                      Blank = not set</p> <p>*Marked ready (except Validate) in local save file records for batch. Marked Ready in online save file records for Export only (using Connexion browser)</p>
<p>Workflow (Initially, the system assigns <b>In Process</b>. You can change from a system-supplied list)</p>	<ul style="list-style-type: none"> <li>• Show a record's position in your cataloging workflow</li> <li>• Let you select a different status when editing or re-saving a record</li> </ul>	<p><i>Complete</i>  <i>In Process</i> (system-set default)  <i>In Review</i>  <i>New</i>  <i>Imported</i> (system-assigned status to designate records you import, since authority files have no separate source status)</p>
<p>Lock status  (You lock or release a record; the system supplies the appropriate status)</p>	<p>Show when the WorldCat record is locked</p>	<p><i>Locked</i> (Appears in the record information area if the record is locked)</p>
<p>My Status (You assign)  <b>Local save file only</b></p>	<ul style="list-style-type: none"> <li>• Assign a customized status; for example, you assign your name or a priority (such as "high" or "low") to records</li> <li>• Create categories of records in ways that help you easily retrieve them</li> </ul>	<p>Up to 40 characters of free text you entered (<b>Action &gt; Set Status</b>) or <b>Tools &gt; Options &gt; My Status</b> [assign default])</p> <p>See "Change or assign workflow status or My Status" above for more information.</p>

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Type of Status (supplied by)	Purpose	Categories/Values
Submitted for Review status  <b>Online save file only</b>	<ul style="list-style-type: none"> <li>- Retrieve records you submitted to other libraries for review</li> <li>- Especially useful if you need to <b>Recall Submitted Record</b> (Action menu) and when you need to revise or complete the record based on review comments</li> </ul>	Retrieve when you search the online save file by selecting the <b>Submitted for Review</b> check box in the Search Online Authority Save File dialog (leave other search criteria empty) Or Retrieve using <b>Authorities &gt; Show &gt; By Online Save File Status</b> (select only the <b>Submitted</b> check box)
Review File status  <b>Online save file only</b>	Retrieve all records sent to your library for review Or Retrieve records sent to your library for review by one specific library	Retrieve when you search the online save file by selecting one of the following check boxes in the Search Online Authority Save File dialog (leave other search criteria empty): <ul style="list-style-type: none"> <li>- <b>All Review File Records</b></li> <li>- <b>Review File Records for Institution</b> [type institution symbol in adjacent text box]</li> </ul>

See more information about the status bar display in Basics, Use Client Interface, “Status bar” and about save file list display in “Use authority save file search results.”


## 2 Search for saved authority records

See also:

“Search indexes for authority save files”

“Use online authority save file search results”


### Find authority records in the online save file

	Action
1	Log on to the system.
2	On the Authorities menu, click <b>Search &gt; Online Save File</b> , or click  , or press <Alt><F3>.
3	<p>In the Search Online Authority Save File dialog, in the <b>Search for</b> text box, type one or more search terms.</p> <p>Or</p> <p><b>To retrieve all save file records:</b>            Leave all search criteria blank, and then click <b>OK</b> or press &lt;Enter&gt;. Ignore remaining steps in this procedure.</p> <p><b>Tip:</b> Save file lists are sorted in alphabetical order by main entry. Re-sort records in the save file list by clicking any column heading to sort by the data in that column.</p>
4	<p>In the adjacent list, click the index you want to search. Indexes include:</p> <ul style="list-style-type: none"> <li>• Save File Number</li> <li>• LCCN</li> <li>• LCSH</li> <li>• OCLC ARN</li> <li>• Personal Names</li> <li>• Corporate Names</li> <li>• Conference Names</li> <li>• Titles</li> <li>• Topicals</li> <li>• Geographic Names</li> <li>• Children’s Subjects</li> <li>• Reference Headings</li> <li>• Subdivision Headings</li> <li>• Replace Date</li> </ul> <p>See “Search indexes for authority save files” for more information.</p>

	<b>Action</b>
5	<p>Optional. <b>Combine search terms:</b></p> <p>To search for multiple terms in the same index, type more than one term in the same text box and select the index. Spaces between words are treated as <b>AND</b> operators. You can also combine terms with <b>OR</b> or exclude terms with <b>NOT</b>.</p> <p>Or</p> <p>To search for two terms in different indexes, type the second search term(s) in the second text box. In the Boolean operator list, click <b>AND</b>, <b>OR</b>, or <b>NOT</b> to combine the two terms. In the adjacent list, click the index you want to search.</p> <p>For more details and examples, see “Tips for keyword searches.”</p>
6	<p>Optional: <b>Insert diacritics or special characters:</b></p> <p>Place the cursor where you want to insert a diacritic or character and click <b>Enter Diacritics</b>. In the Insert Diacritics and Special Characters dialog, click the image or the name of the character you want to insert.</p> <p>See Authorities, Edit Authority Records, “Insert diacritics and special characters” for more information.</p>
7	<p>Optional. <b>Limit the search by a specific workflow status:</b></p> <p>Click one of the following statuses:</p> <ul style="list-style-type: none"> <li>• Completed</li> <li>• Imported</li> <li>• In Process</li> <li>• In Review</li> <li>• New</li> </ul> <p><b>Note:</b> To find only records with a specified workflow status, enter no other search criteria.</p>
8	<p>Optional. <b>Limit search by records you submitted to other libraries for review:</b></p> <p>Click the <b>Submitted for Review</b> check box.</p> <p><b>Note:</b> To find only records you submitted for review, enter no other search criteria.</p>
9	<p>Optional. <b>Retain the current search:</b></p> <p>Click the <b>Retain Search</b> check box. The client keeps the search each time you open the Search Online Authority Save File dialog until you change it.</p>

	Action
10	<p>Optional. <b>Limit search to Review File records that other libraries sent to you for review:</b></p> <p>Click the <b>All Review File Records</b> check box.                      Or                      Click the <b>Review File Records for Institution</b> check box and type an institution symbol in the adjacent text box.  <b>Note:</b> To find only records that one or more libraries set you to review, enter no other search criteria.</p>
11	<p>Click <b>OK</b> or press &lt;Enter&gt; to send the search.                      Or                      Click <b>Clear Search to clear the search (keeps only the index selection) and enter another.</b>  <b>Or</b>                      Click <b>Cancel</b> to cancel the search and close the dialog.                      See also, "Use authority save file search results."</p>

**Find authority records in local save file**

	Action
1	<p>On the Authorities menu, click <b>Search &gt; Local Save File</b>, or click  , or press &lt;Shift&gt;&lt;F3&gt;.</p>
2	<p>Optional. <b>Change the default file.</b> The Search Online Authority Save File dialog opens. At the top, the full path and file name of the default authority save file is displayed.</p> <p>You can change the default by selecting another file from the <b>Local File</b> list at the top of the dialog.</p> <p>If you change the file, after you enter the search and click <b>OK</b> or press &lt;Enter&gt;, the client gives you that message that changing the file will:</p> <ul style="list-style-type: none"> <li>• Close all records from the file</li> <li>• Change the default file to the one you selected</li> </ul> <p>Click <b>Yes</b> to confirm changing the default file or <b>No</b> to cancel.</p> <p><b>Note:</b> If you do not want to see this prompt each time you change local files, select the <b>Do not display this prompt again</b> check box.</p>
3	<p>In the Search Online Authority Save File dialog, in the <b>Search for</b> text box, type one or more search terms.</p> <p>Or</p> <p><b>To retrieve all records:</b>                      Leave all search criteria blank, and then click <b>OK</b> or press &lt;Enter&gt;. Ignore remaining steps in this procedure.</p>

	<b>Action</b>
4	<p>In the adjacent list, click the index you want to search. Indexes include:</p> <ul style="list-style-type: none"> <li>• Save File Number</li> <li>• OCLC ARN</li> <li>• Heading</li> <li>• My Status</li> <li>• MARC Organization Code</li> </ul> <p>See also, “Search indexes for authority save files” for more information.</p>
5	<p>Optional. <b>Combine search terms:</b></p> <p>To search for multiple terms in the same index, type more than one term in the same text box and select the index. Spaces between words are treated as <b>AND</b> operators. You can also combine terms with <b>OR</b> or exclude terms with <b>NOT</b>.</p> <p>Or</p> <p>To search for two terms in different indexes, type the second search term(s) in the second text box. In the Boolean operator list, click <b>AND</b>, <b>OR</b>, or <b>NOT</b> to combine the two terms. In the adjacent list, click the index you want to search.</p> <p>For more details and examples, see “Tips for keyword searches.”</p>
6	<p>Optional: <b>Insert diacritics or special characters:</b></p> <p>Place the cursor where you want to insert a diacritic or character and click <b>Enter Diacritics</b>. In the Insert Diacritics and Special Characters dialog, click the image or the name of the character you want to insert.</p> <p>See Authorities, Edit Authority Records, “Insert diacritics and special characters” for more information.</p>
7	<p>Optional. <b>Limit the search by status:</b></p> <ul style="list-style-type: none"> <li>• Workflow status</li> <li>• Action status</li> </ul> <p>In the first status list, click the type of status, and in the adjacent list of available statuses for that category, click the name of the status you want to find.</p> <p>To further limit or to expand the search by statuses, combine another status using Boolean operators. See “Tips for keyword searches” for more information.</p> <p><b>Note:</b> To find only records with one or more statuses, enter no other search criteria.</p>
8	<p>Optional. <b>Limit search to locked or not locked records:</b></p> <p>Click the <b>Locked or Not Locked</b> check box. A check mark in a box indicates that it is selected.</p> <p><b>Note:</b> To find only locked or not locked records, enter no other search criteria.</p>
9	<p>Optional. <b>Specify the order you want the client to use to sort search results:</b></p> <p>In the <b>Retrieval Order</b> list, select one of the following sort orders:</p> <ul style="list-style-type: none"> <li>• Save File Number (<b>default</b>)</li> <li>• OCLC ARN</li> <li>• Date/Time Added</li> <li>• Heading</li> </ul>



	Action
10	Optional. <b>Retain the current search:</b>  Click the <b>Retain Search</b> check box. The client keeps the search each time you open the Search Online Authority Save File dialog until you change it.
11	Click <b>OK</b> or press <Enter> to send the search. <b>Result:</b> Search results are from the default local save file. Or Click <b>Clear Search</b> to clear the search (keeps only the index selection) and enter another. <b>Or</b> Click <b>Cancel</b> to cancel the search and close the dialog. See also, "Use authority save file search results."

**Note:** More than one person can use a shared local file at the same time, but only one user at a time can open a record in a local file. If you try to open a record already opened by another user, the client gives you a message to that effect.

See also, Basics, Manage Local Files, "Manage local files for online/offline cataloging."

**Stopwords**

The following words are not indexed for searching either the online or the local authority save file:

a, an, and, are, as, at, be, by, for, from, in, is, of, on, or, that, the, to, with, http, www

Stopwords are automatically removed from searches to make the search valid. You do not receive an error message if you include stopwords in a search. Searches that include only stopwords result in no matches.

**Alternative search method: Show records by status**

	Action
1	On the Authorities menu, click <b>Show &gt; By Online Save File Status</b> , or press <Alt><U><H><S>. Or Click <b>Show &gt; By Local Save File Status</b> , or press <Alt><U><H><L>.  <b>Result:</b> The Status List displays statuses and, in parentheses, the number of records in the (online or local) save file that have a particular status.
2	In the online* or local** Status List, click check boxes next to statuses for records you want to view.
3	Optional. To view all records, click <b>Check All</b> , or to cancel selections, click <b>Clear All</b> .
4	When finished selecting, click <b>Show Records</b> or press <Enter>. Or Click <b>Cancel</b> to close the dialog without viewing records.

## Authorities: Save Authority Records

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\*Statuses you can select in the **online** Status List are:

- Workflow Status
  - Complete
  - Imported
  - In Process
  - In Review
  - New
- Review Status (Submitted)

\*\*Statuses you can select in the **local** Status List are:

- Action Status (Completed, Failed, Ready, or Not Set) for:
  - Add
  - Export
  - Replace
  - Submit
  - Validate
- Workflow Status
  - Complete
  - Imported
  - In Process
  - In Review
  - New

**Note:** The local Status List also shows the total number of records in the file.

### Download records from the authority online save file

In addition to retrieving Authority File records via batch searching, you can retrieve records from the online authority save file using the same Enter Authority Batch Search Keys dialog:

	Action
1	In the Enter Authority Search Keys dialog, click the <b>Retrieve all records from online save file</b> check box.
2	<p><b>Optional.</b> Under <b>Limit by Review Status</b>, click one of the following check boxes:</p> <ul style="list-style-type: none"> <li>• <b>Non-Submitted</b> (retrieves only records you submitted for review to colleagues in other libraries)</li> <li>• <b>Submitted</b> (retrieves only records you did not submit for review)</li> </ul>
3	<p><b>Optional.</b> Select the <b>Delete downloaded records from online save file</b> check box if desired.</p> <p>If a record you download is locked:</p> <ul style="list-style-type: none"> <li>• <b>With this option cleared:</b> The WorldCat record lock is retained in the online savefile</li> <li>• <b>With this option selected:</b> The WorldCat record lock is released</li> </ul>

## Authorities: Save Authority Records

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	<b>Action</b>
4	Click <b>Save</b> and then click <b>Close</b> when finished.
5	When ready, run batch processing (see "Run batch processing" for instructions).

### 3 Use authority save file search results

**How results display** The following table shows how the client presents search results when you search the online or local save file:

Applies to online and/or local save file?	Number of records found	The client displays...
Online and local save file	0	A message asking you to change or simplify the search and try again
Online and local save file	1	The full record
Online save file only	2 to 100	<ul style="list-style-type: none"> <li>A list of records showing extensive details</li> <li>The list is sorted in descending order by save file number (number the system assigns when you save a record)</li> </ul>
	101 records or more	<ul style="list-style-type: none"> <li>A message that tells you:                             <ul style="list-style-type: none"> <li>The total number of records found</li> <li>That the displayed list contains the first 100 records</li> <li>How to view the next 100 (<b>View &gt; Next 100 Records</b>)</li> </ul> </li> <li>A list of the first 100 records</li> </ul> <p>The entire list is sorted by save file number, even though you see only 100 entries at a time</p>
Local save file only	2 to 9,999	<ul style="list-style-type: none"> <li>A continuous list of all records in the local file, showing extensive details</li> <li>The list is sorted in order by main entry, unless you specified a different sort order in the Search Local Authority Save File dialog when you did the search</li> </ul>

**What results lists show**

**Note:** Changes you make to the content of a record or actions you take on a record opened from a list are not reflected in the list until you resave the record, close the list, and do the search again. The list reopens showing the updated information.

**Online Authority Save File List.** The title bar gives the title of the list. For each record entry, columns show the following information in this order, by default (you can customize the way the list displays):

- **Save #** (unique save file number assigned by the system when you save a record)
- **Main entry** (default sort order)
- **Expires** (number of days till the record expires and the system deletes it unless you resave) (maximum number of days: 20)
- **Workflow** status. System assigns:
  - **Imported** for records you import
  - **In Process**, a default status you can change to **Completed**, **In Review**, or **New** (using **Action > Set Status**)
- **Review** (shows *Submitted* for records submitted to your library for review)
- **Reviewing Institutions** (OCLC institution symbol for a library for which you requested review records)

**Local Authority Save File List.** The title bar gives the title of the list and the name of local file. For each record, columns show the following information in this order, by default (you can customize the way the list displays):

- **Save #** (unique save file number assigned by the system when you save a record)
- **Main entry** (default sort order)
- **OCLC Control #** (ARN or *NEW* if workform)
- **Date/Time Added** (date and time the record was added to the local file)
- **Code** (MARC organization code for NACO participants)
- **Locked** (shows *Locked* if WorldCat record is locked; blank if not)
- **Lock Expiration** (date the lock expires; lock cannot be extended for authority records)
- **Workflow** status. System assigns:
  - **Imported** for records you import
  - **In Process**, a default status you can change to **Completed**, **In Review**, or **New** (using **Action > Set Status**)
- **Source** status (system assigns the source status based on the record's origin)
- Action statuses:
  - Add (C=Complete, F=Failed, R=Ready, or Not Set)**
  - Export (C=Complete, F=Failed, R=Ready, or Not Set)**
  - Replace (C=Complete, F=Failed, R=Ready, or Not Set)**
  - Validate (C=Complete, F=Failed, or Not Set)**

**Submit** (C=Complete, F=Failed, R=Ready, or Not Set)  
 (Blank = not set)


- **My Status** (free-text note or identifier you enter)

**Hide columns or change the order**

Since a save file list contains many columns, you may want to hide columns or change the order to show data that is most important to you without having to scroll horizontally:

	<b>Action</b>
1	Right-click anywhere in a list, and on the popup menu, click <b>List Settings</b> .
2	<p><b>To hide a column:</b>                      In the Column Settings dialog, select a column by its name and click <b>Hide</b>.                      Or                      Double-click a column to clear the check box next to its name.</p> <p><b>To display a hidden column:</b>                      Select the column and click <b>Show</b>, or single-click its name.</p> <p><b>Default:</b> All columns are selected.</p>
3	<p><b>To change the order of columns:</b></p> <p>Select each column you want to move, one by one, and click <b>Move Up</b> or <b>Move Down</b> until it is in the position you want.</p> <p>For default order see the section above on using the results list.</p> <p>Or use the mouse to change order of columns:</p> <p>You do not have to use the <b>Column Settings</b> command in the right-click menu to change the order of columns. Instead:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over the column heading of the column you want to move.</li> <li>2. Hold down &lt;Ctrl&gt; and left-click and drag the column heading.                      Or                      Right-click, hold and drag the column heading.</li> </ol> <p>While you drag, the cursor becomes a rectangle.</p> <ol style="list-style-type: none"> <li>3. Drop the rectangle on top of the border between the two columns where you want to place the column you are dragging.</li> </ol>
4	To restore the default order of columns and re-display all columns, click <b>Reset</b> .
5	Click <b>OK</b> to make your changes and close the dialog. Or Click <b>Cancel</b> to close the dialog without making the changes.

### Resize columns

Action
Move the cursor over the right-hand border of the heading for the column you want to resize until the cursor becomes  . Then click and hold while you drag the border to a new position.
To restore column widths to the default, right-click anywhere in the list. On the popup menu, click <b>Restore List Sizes</b> .
<b>Result:</b> In the confirmation message, click <b>OK</b> to confirm, or click <b>Cancel</b> to keep the column widths as they are. When you reopen a list of this type, the original column widths are restored.

### Re-sort a list

Action
Click any column heading to re-sort entries by data in that column.
Or
On the View menu, click <b>Sort By &gt; Main Entry</b> ; or press <Alt><V><S><A>, <Alt><V><S><E>, or <Alt><V><S><T>, respectively.
<b>Note on online save file lists only:</b> For lists of more than 100 records, sorting applies only to the 100 records currently displayed. If you display another set of 100 records, you must re-sort the list.

### Online save file list only: View a list of more than 100 records

The client shows only 100 records at a time when online save file search results exceed that number. To display other sets of 100 in the list:

Action
To view the next 100 records in the search results list, on the View menu, click <b>Next 100 Records</b> , or press <Ctrl><Alt><Shift><V>, or press <Page down>.
Or
To view the previous 100 records, on the View menu, click <b>Previous 100 Records</b> , or press <Ctrl><Alt><Shift><U>, or press <Page up>.
<b>Tip:</b> Check the status bar to see where you are in the list of total records found. For any record selected on the list or opened for display, the status bar shows the record number of the total number of records found (for example <i>234 of 1,234</i> ).

**Note:** All search results from the local save file display in a continuous list.

**Select multiple records in a list**

<b>Action</b>
<p><b>Select adjacent records:</b>                      Click to highlight the first entry, and then press and hold &lt;Shift&gt; and click the last entry. The entire group of records between the entries is selected.                      Or                      Click an entry and hold the mouse button down while you drag the cursor up or down in the list to select the group of records you want.</p> <p><b>Select nonadjacent entries:</b>                      Click to highlight the first entry. Then press &lt;Ctrl&gt; and click to highlight each additional entry.</p>

**Print a list or selected entries**

You can print an entire list or print selected entries in a list:



	<b>Action</b>
1	<p>With an Online Authority Save File List or a Local Authority Save File List open, on the File menu, click <b>Print List</b>, or press &lt;Shift&gt;&lt;F12&gt;.</p> <p>Or                      Select only entries you want to print, and then on the File menu, click <b>Print List</b>, or press &lt;Shift&gt;&lt;F12&gt;.</p>
2	<p>If you have multiple records selected, the Print List dialog opens, with the <b>Selected Items</b> button selected by default.</p> <p>Click <b>OK</b> to confirm, or select the <b>All</b> button and then click OK to print all records in the list, or click <b>Cancel</b> to cancel printing.</p> <p>Otherwise, go to step 3.</p>
3	<p>In the Print dialog, click <b>Print</b> or press &gt;Enter&gt;.</p> <p>Note for online save file list only: If results exceed 100 records, you can print only the set of currently displayed records. You must display other sets in the list to print them.</p>

**Note:** Connexion client uses Internet Explorer (IE) to print records and lists. Therefore, page margins for printing are determined by IE Page Setup settings. To adjust the margins, open the browser, and on the File menu, click **Page Setup**. You can determine other print settings (for example, portrait or landscape orientation) in the client Print dialog.

For general information on using lists in Connexion client, see Basics, Use Client Interface, "Record lists."






### Open records in a list

Action
<p>In a list, double-click an entry, or click to highlight the entry and press &lt;Enter&gt;.</p> <ul style="list-style-type: none"><li>To open the next record without returning to the list, on the View menu, click <b>Forward</b>, or click , or press &lt;F9&gt;.</li><li>To open the previous record, on the View menu, click <b>Back</b>, or click , or press &lt;Shift&gt;&lt;F9&gt;.</li></ul>

**Note on records in local file:** More than one person can use a shared local file at the same time, but only one user at a time can open a record in a local file. If you try to open a record already opened by another user, the client gives you a message that someone else is using the record.

### Print a record

Action
<p>With a record open, on the File menu, click <b>Print</b>, or click , or press &lt;Shift&gt;&lt;F12&gt;, or press &lt;Alt&gt;&lt;F&gt;&lt;P&gt;.</p> <p><b>Results:</b></p> <ul style="list-style-type: none"><li>If you click , the record prints immediately using your default Windows printer, unless you elected to print records to a file (<b>Tools &gt; Options &gt; Printing</b>).</li><li>Otherwise, the Print dialog opens. Your default Windows printer is selected, but you can select any printer from the list of printers installed on your workstation.</li></ul> <p>In the Print dialog, click <b>OK</b> or press &lt;Enter&gt; to print the record.</p> <p>Or</p> <p><b>Available for local save file lists only:</b></p> <p>Select records in a list that you want to print separately (hold &lt;Shift&gt; and click for adjacent records or hold &lt;Ctrl&gt; and click for non-adjacent records). On the File menu, click <b>Print</b>, or click , or press &lt;Ctrl&gt;&lt;P&gt;.</p> <p><b>Result:</b> The records print immediately using your default Windows printer, unless you selected to print records to a file (<b>Tools &gt; Options &gt; Printing</b>).</p>

**Note:** See Note above in “Print a list” about adjusting page margins for printing.

For general information on using records in Connexion client, see Basics, Use Client Interface, “Records.”


## Authorities: Save Authority Records

### Navigate among records and lists

When you have multiple records and lists open, you can use commands on the View and Window menus, or equivalent toolbar buttons or keystroke shortcuts, to navigate among the open windows. See Basics, Use Client Interface, "Record lists" for procedures.


### Actions on saved authority records

The following table shows actions you can take on single saved authority records or on multiple records selected in a save file list. The table also provides a summary of actions available for processing in batch mode.

Action	Available in ... logged on? offline?	How to
<b>Print records or list</b>	Online save file And Local save file (logged on or offline)	See "Print a record" and "Print a list" above
<b>Save record</b> (with or without modifying)	Online save file And Local save file (save from local file to online file only when logged on)	With a save file record open, or with records selected in an online or local save file list:  On the Action menu, click <b>Save Record Online</b> , or press <Ctrl><Alt><V>. Or Click <b>Save Record to Local File</b> (or press <F4>).
<b>Delete record from save file</b>	Online save file And Local save file (logged on or offline)	With a save file record open, or with records selected in an online save file list: 1. On the Action menu, click <b>Delete Record</b> , or click  , or press <Ctrl><Alt><D>. 2. Click <b>Yes</b> to confirm. <b>Note:</b> To delete a locked authority record from the local file, you must be logged on (system unlocks the WorldCat record).

Action	Available in ... logged on? offline?	How to
<b>Set or change My Status or workflow status</b>	Online save file ( <b>workflow only</b> ) And Local save file (logged on or offline)	<p>With a save file record open, or with records selected in an online save file list:</p> <ol style="list-style-type: none"> <li>1. On the Action menu, click <b>Set Status</b>, or press &lt;Alt&gt;&lt;Shift&gt;&lt;S&gt;.</li> <li>2. For local records only, in the Enter My Status Text box, type a custom status (40 characters maximum). <b>Note:</b> The online authority save file does not yet support the My Status feature. If you add My Status and save the records online, the My Status data is deleted.</li> <li>3. In the Workflow Status list, click to change the status (<b>default: In Process</b>).</li> <li>4. Optional. click the <b>Save Record</b> check box to also save the record when the client sets your selected status.</li> <li>5. Click <b>OK</b> or press &lt;Enter&gt;.</li> </ol>
<b>Edit saved record</b>	Online save file And Local save file (logged on or offline)	<p>With an online or local save file record open, edit the record.</p> <p>You can use all Edit menu commands. Exception: For local save file records, you must be logged on to use:</p> <ul style="list-style-type: none"> <li>• <b>Validate</b></li> <li>• All commands on the submenu for applying <b>online</b> constant data.</li> </ul> <p>See “Edit authority records” for more about editing.</p>
<b>Apply default constant data</b>	Online save file And Local save file (apply default online constant data only when logged on)	<p>With an online or local save file record open, or with records selected in an online save file list:</p> <p>On the Edit menu, click <b>Constant Data &gt; Online &gt; Apply Default</b> (or press &lt;Ctrl&gt;&lt;A&gt;). Or Click <b>Constant Data &gt; Local &gt; Apply Default</b> (or press &lt;Ctrl&gt;&lt;Y&gt;).</p> <p>See Authorities, Use Authority Constant Data, “Apply constant data.”</p>

Action	Available in ... logged on? offline?	How to
<b>Apply constant data by name</b>	Online save file And Local save file (apply online constant data only when logged on)	With an online or local save file record open, or with records selected in an online save file list: 1. On the Edit menu, click <b>Constant Data &gt; Online &gt; Apply by Name</b> (or press <Ctrl><U>). Or Click <b>Constant Data &gt; Local &gt; Apply by Name</b> (or press <Alt><E><D><L><N>). 2. In the Apply Constant Data Record dialog, enter the name of the constant data record you want to apply. 3. Select MARC fields to apply (fixed, variable, or both). 4. Click <b>OK</b> or press <Enter>. See Authorities, Use Authority Constant Data, "Apply constant data."
<b>Apply constant data from a list</b>	Online save file And Local save file (apply online constant data only when logged on)	With an online or local save file record open, or with records selected in an online save file list: 1. On the Edit menu, click <b>Constant Data &gt; Online &gt; Apply from List</b> (or press <Alt><E><D><O><L>). Or Click <b>Constant Data &gt; Local &gt; Apply from List</b> (or press <Alt><E><D><L><L>). The client retrieves and displays all of your constant data records. 2. In the Online (or Local) Authority Constant Data list, select the constant data record you want to apply. 3. Select MARC fields to apply (fixed, variable, or both). 4. Click <b>Apply Selected</b> . See Authorities, Use Authority Constant Data, "Apply constant data."

Action	Available in ... logged on? offline?	How to
<b>Export saved record</b>	Online save file And Local save file (logged on or offline)	<p>With an online or local save file record open, or with records selected in a save file list:</p> <p>On the Action menu, click <b>Export</b>, or click , or press &lt;F5&gt;. (Record must have an OCLC ARN.)</p> <p>Note: Unless you set an option to mark records for batch export in <b>Tools &gt; Options &gt; Batch</b>, records export immediately whether you are logged on or offline.</p> <p>See Authorities, Export or Import Authority Records, "Export authority records."</p>
<b>Lock WorldCat Record</b>	Online save file And Local save file (logged on)	<p>With a save file record open:</p> <p>On the Action menu, click <b>Lock WorldCat Record</b>, or press &lt;Alt&gt;&lt;F8&gt;. (Unavailable for records selected in a list.)</p> <p>See Authorities, Take Actions on Authority Records, "Replace WorldCat name authority records."</p>
<b>Add to Authority File</b> (NACO-affiliated libraries only)	Online save file And Local save file (logged on or mark for batch if offline)	<p>With a save file record open, or with records selected in a local save file list (offline to mark for batch only):</p> <p>On the Action menu, click <b>Add to Authority File</b>, or press &lt;Ctrl&gt;&lt;Alt&gt;&lt;A&gt;. (Unavailable for records selected in an online list.)</p> <p>See Authorities, Take Actions on Authority Records, "Add new name authority records."</p>

<b>Action</b>	<b>Available in ... logged on? offline?</b>	<b>How to</b>
<b>Replace Record</b> (NACO-affiliated libraries only)	Online save file And Local save file (logged on or mark for batch if offline)	With a save file record open, or with records selected in a local save file list (offline to mark for batch only):  On the Action menu, click <b>Replace Record</b> , or press <Ctrl><Alt><F10>. (Unavailable for records selected in an online list.)  See Authorities, Take Actions on Authority Records, "Replace WorldCat name authority records."
<b>Submit for Review</b>	Online save file And Local save file (logged on or mark for batch if offline)	With a save file record open, or with records selected in a local save file list:  On the Action menu, click <b>Submit for Review</b> , or press <Alt><F8>.  See Authorities, Take Actions on Authority Records, "Exchange records with other libraries for peer review."
<b>Validate</b>	Online save file And Local save file	With a save file record open, or with records selected in an online or local save file list:  On the Edit menu, click <b>Validate</b> , or press <Shift><F5>.  See Authorities, Edit Authority Records, "Validate records online or offline."
<b>Copy Record</b> Or <b>Move Record</b>	Local save file only (logged on or offline)	With a local save file record open, or with records selected on a local save file list:  On the Action menu, click <b>Copy Record</b> or <b>Move Record</b> , or press <Alt><A><Y> or <Alt><A><V>, respectively.  See Basics, Manage Local Files, "Manage local files for online/offline cataloging."
<b>Actions available for batch processing</b>		

## Authorities: Save Authority Records

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<b>Action</b>	<b>Available in ... logged on? offline?</b>	<b>How to</b>
<p>When you are logged off and you take the following actions on single records or records selected in a local save file list, the client marks the records for batch processing:</p> <ul style="list-style-type: none"><li>- Add to Authority File (NACO participants only)</li><li>- <b>Replace Record</b> (NACO participants only)</li><li>- <b>Submit for Review</b></li></ul> <p><b>Batch export:</b></p> <p>When you are logged on or off and you export records, the records export immediately. You must set the <b>Perform local actions in batch</b> option for <b>Record Export</b> in <b>Tools &gt; Options &gt; Batch</b> to mark records for batch export.</p>		

## 4 Search indexes for authority save files

**Online authority save file indexes** Enter searches from **Authorities > Search > Online Save File** (or <Alt><F3>). Examples in this table assume that the Search Online Authority Save File dialog is open.

Index (label)	MARC fields indexed	MARC subfields indexed
LCCN (ln)	010	a z
LCSH (su)	See Subdivision Headings	See Subdivision heading
OCLC ARN (an)	001	N/A
Personal Names (pn)	100, 400, 500	a b c d g
Corporate Names (co)	110	a b c d n
	151	If only a is present, then 151 is indexed as a Corporate Name. If any one of the following is present—v x y z—then 151 is not indexed as a Corporate Name
	410	a b c d n
	451	If only a is present, then 451 is indexed as a Corporate Name. If any one of the following is present—v x y z—then 451 is not indexed as a Corporate Name.
	510	a b c d e n u
	551	If only a is present, then 551 is indexed as a Corporate Name. If any one of the following is present—v x y z—then 551 is not indexed as a Corporate Name
Conference Names (cn)	111, 411, 511	a c d e n q
Titles (ti)	100, 110, 111	k t g h m n o p r s
	130	a k g h m n o p r s
	400, 410, 411	a v x y z
	430, 500, 510, 511, 530	k t g h m n o p r s
Topicals (to)	150, 450, 550	All
Geographic Headings (gg)	151, 451, 551	All



## Authorities: Save Authority Records

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

The following table describes indexes for save file number, status, and replace date:

Index (label)	Definition/notes	Format of search/example
Save File Number (sf)	Sequential number assigned when you saved the record.  Appears in the <b>Save File #</b> column of the search results list and in the information area at the top of the record.	In the <b>Search for</b> box, type the number for the record you want. Save file numbers can be up to 4 digits, ranging from 1 to 9999.
Workflow Status (ws)	Workflow status assigned to the record.  Available statuses: <b>Completed</b> <b>Imported*</b> <b>In Process</b> <b>In Review</b> <b>New</b> <b>Responded*</b>  System assigned. You cannot assign <b>Imported</b> or <b>Responded</b> to a record. If you resave a record that has a Responded status, you must change to a user-available status  Appears in the Workflow column of the search results list and in the status bar of the record	In the index list following <b>Workflow Status</b> , click the name of the status you want.

## Authorities: Save Authority Records

Index (label)	Definition/notes	Format of search/example
Replace Date (rp)	Date the record was last modified or resaved.	<ul style="list-style-type: none"> <li>Type all 8 digits of the date, in order: <i>yyyymmdd</i>.</li> <li>Omit hyphens or any other separators.</li> <li>To search for a range of dates, truncate by typing an asterisk (*) after the 4-digit year or after the year and month.</li> </ul> <p><b>Example:</b> To search for records modified on December 10, 2003, type: <b>20020204</b> or <b>200202*</b></p>

### Delayed indexing for new online save file records

- When you save a record to the authority save file, the save file number for the record is indexed immediately.
- Complete indexing of the record may take up to one minute.
- To retrieve a record immediately after saving it, search by the save file number. The system reports the save file number in the confirmation message displayed when the record is saved successfully.

### Local authority save file indexes

Enter searches from **Authorities > Search > Local Save File** (or <Shift><F3>). Examples in this table assume that the Search Local Authority Save File dialog is open.

Index (label)	Source of information indexed	Format of search/example
Save File Number (sf)	<p>Sequential number assigned when you saved the record.</p> <p>Appears in the <b>Save #</b> column of the search results list and in the information area at the top of the record.</p>	<p>In the <b>Search for</b> box, type the number for the record you want. Save file numbers can be up to 4 digits, ranging from 1 to 9999</p>
OCLC ARN (an)	<p>001 a</p> <p>Appears in the Control # column of the search results list and in the information area of the record</p>	<p>In the <b>Search for</b> box, type the ARN for the record you want</p> <p><b>Example:</b> <b>05382722</b></p>

Index (label)	Source of information indexed	Format of search/example
Heading (he)	100, 110, 111, 130, 150, 151, 155, 180, 181, 182, 185, 400, 410, 411, 430, 450, 451, 455, 480, 481, 482, 485, 500, 510, 511, 530, 550, 551, 555, 580, 581, 582, 585  All subfields	In the <b>Search for</b> box, type the heading  <b>Example:</b> <b>clancy ann</b>
Workflow Status (ws)	Workflow status assigned to the record.  Available statuses: <ul style="list-style-type: none"> <li>- <b>Completed</b></li> <li>- <b>Imported*</b></li> <li>- <b>In Process</b></li> <li>- <b>In Review</b></li> <li>- <b>New</b></li> </ul> *System assigned. You cannot assign <b>Imported</b> or Responded to a record. If you resave a record that has a Responded status, you must change to a user-available status  Appears in the <b>Workflow</b> column of the search results list and in the status bar of the record	In the index list following <b>Workflow Status</b> , click the name of the status you want
My Status (ms)	Customized status you entered in free text (maximum 40 characters) ( <b>Action &gt; Set Status</b> )  Appears in the <b>My Status</b> column of the search results list and in the status bar of the record	In the <b>Search for</b> box, enter as much of the My Status text as is unique to the records you want to retrieve
MARC Organization Code (cd)	040 a	In the <b>Search for</b> box, enter the MARC organization code for the records you want
WorldCat Record Locked (lk)	You lock or release a lock on a record; the system supplies the status  Appears in the <b>Locked</b> column of the search results list and in the information area of the record	Under <b>WorldCat Record</b> , click the <b>Locked</b> check box

Index (label)	Source of information indexed	Format of search/example
Action Status (as)	<p>Actions you take on a record and system-supplied outcomes</p> <p>Appears in the <b>Add, Export, Replace, Validate, and Submit</b> columns of the search results list and in the status bar of the record</p>	<p>In the <b>Action Status</b> index list, select one of the following:</p> <ul style="list-style-type: none"> <li>Add - Completed</li> <li>Add - Failed</li> <li>Add - Ready</li> <li>Add - Not Set</li> <li>Export - Completed</li> <li>Export - Failed</li> <li>Export - Ready</li> <li>Export - Not Set</li> <li>Replace - Completed</li> <li>Replace - Failed</li> <li>Replace - Ready</li> <li>Replace - Not Set</li> <li>Validate - Completed</li> <li>Validate - Failed</li> <li>Validate - Not Set</li> <li>Submit - Completed</li> <li>Submit - Failed</li> <li>Submit - Ready</li> <li>Submit - Not Set</li> </ul>

## 5 Tips for keyword searches

### Tips cover save file keyword searches and Authority File keyword searches

The following tips cover combining search terms and statuses, finding variants of search terms, and finding singular and plural terms.

Tips apply to keyword searches in bibliographic and authority save files, both online and local, and to Authority File keyword/numeric searches, depending on the various search parameters in each search dialog.

These tips do not currently cover WorldCat searches.

### Combine search terms in one index

To search for multiple terms in one index, type all terms and Boolean operators in one **Search for** box in the Search dialog for the type of save file you are searching:

To find records that ...	Enter ...	Example
Contain all specified multiple terms ( <b>and</b> )	<i>[term 1] [term 2]</i> Or <i>[term 1] and [term 2]</i>  A space between terms is treated as an <b>and</b> .	<b>transportation safety</b>  <b>gaudier and brzeska</b>
Contain at least one of the specified multiple terms ( <b>or</b> )	<i>[term 1] or [terms 2]</i>	<b>radiography or radiology</b>
Do not contain one or more specified terms ( <b>not</b> )	<i>[term 1] not [term 2]</i> Or <i>[term 1] or [term 2] not [term 3]</i>	<b>college education not elementary</b>  <b>brzeska not gaudier</b>
Contain one or more groups of terms combined with other terms (terms grouped in parentheses)	<i>[term 1] ([term 2] or [term 3])</i> <i>[term 1] or ([term 2] or [term 3])</i> <i>[term 1] or ([term 2] [term 3])</i>	clinical (trial* or research)

### Combine search terms in multiple indexes

To search for single terms in more than one index, type each term in separate **Search for** boxes in the Search dialog for the save file you want to search and combine by selecting a Boolean operator and an index from the Search dialog lists:

Boolean operator	Retrieves	Example
<b>AND</b>	Only records that contain both terms	For online authority save file:  <b>food</b> (topical index) <b>AND Smith</b> (personal name index)
<b>OR</b>	Records that contain at least one of the terms	For online bibliographic save file:  <b>universities</b> (title index) <b>OR 20040707</b> (used date index)

Boolean operator	Retrieves	Example
NOT	Records that do not contain the term	For local bibliographic save file: <b>persuasion</b> (title index) <b>NOT austen</b> (name index)

**Combine statuses**

- Combining status criteria with **AND** narrows the search. The system retrieves only records that each contain all specified status values:
  - You can **AND** status values of different types. Use more than one status box in a save file search dialog to search for records with a specific statuses.
 

**Example:**  
In the Search Online Bibliographic Save File dialog:  
**Workflow: New AND Source: Imported AND Action: Validate Completed**
  - You can **AND** action status values to search for records on which you have taken various actions. Select **Action Status** in two or three list boxes and then select a different action name for each.
 

**Example:**  
In the Search Local Authority Save File dialog:  
**Action: Add Completed AND Action: Export Completed.**
  - You retrieve no records if you try to **AND** multiple values for the same action category (for example, **Export Failed AND Export Completed** retrieves no records). A record can have only one value for each action.
  - You retrieve no records if you try to **AND** multiple values for workflow status or source status (for example, **Extracted AND Derived** retrieves no records). A record can have only one value for each of these status types.
  
- Combining status criteria with **OR** broadens the search. The system retrieves records that contain any of the specified status values:
  - You can search for records with at least one of two or three possible values for different status types.
 

**Example:**  
In the Search Local Bibliographic Save File dialog:  
**Workflow: New OR Source: Derived OR Action: Validate Completed**
  - You can **OR** two or three possible values for the same status type. Select the same status type in two or three list boxes, select **OR** as the operator, and then select the status values.
 

**Example:**  
In the Search Online Bibliographic Save File dialog:  
**Source: Workform OR Source: Imported**
  
- **Always use AND to combine WorldCat Record Locked** status with any other search criteria, limiting results to locked records that also match other specified terms, statuses, etc.

**Find variant word endings or spellings**

Use the **truncation** symbol (\*) and **character masking** (wildcard) symbols (? or #) to include variant or unknown endings or spellings of a word in a search.

**Note:** You must precede wildcard symbols (? and #) by at least three characters.

Technique	Search format and example
Truncation (find variant endings)	<p>Use truncation when you want to expand a term to include variant endings or know only the first part of a term.</p> <ul style="list-style-type: none"> <li>Type the first characters of the term, including as many characters as variant terms have in common (include at least three characters). Then type an asterisk (*).</li> </ul> <p><b>Examples:</b>  <b>librar*</b> (retrieves <i>library, libraries, librarian, etc.</i>)  <b>comput*</b> (retrieves <i>computer, computerized, computers, etc.</i>)  <b>catalog*</b> (retrieves <i>cataloging, cataloger, catalogue, etc.</i>)</p>
Character masking (wild cards) (find variant spellings)	<p>Use character masking (wildcards) when you want to expand a term to include variant spellings or are unsure of the correct spelling for part of a term.</p> <ul style="list-style-type: none"> <li>Type a question mark (?) or a number sign (#) in place of the character(s) you want to mask. You must precede the question mark or number sign by at least three characters. <ul style="list-style-type: none"> <li>The question mark (?) retrieves variants of 0 or more characters.</li> </ul> </li> </ul> <p><b>Examples:</b>  <b>psych?y</b> (retrieves <i>psychology, psychiatry, psychobiology, etc.</i>)  <b>col?r</b> (retrieves <i>color or colour</i>)  <b>int?net</b> (retrieves <i>internet or intranet</i>)</p> <ul style="list-style-type: none"> <li>The number sign (#) retrieves variants of one character.</li> </ul> <p><b>Example:</b>  <b>wom#n</b> (retrieves <i>woman and women</i>)</p>

**Find singular and plural terms**

The system does not automatically search for the singular form of a word when you enter only the plural form or vice versa. To find both forms of a word using one search:

Action
<p>Type both singular and plural forms combined with OR in one text box to retrieve records with either form.</p> <p><b>Examples:</b>  <b>system or systems</b>  <b>catalog or catalogs</b></p>