



Connexion Client Module 4

Save Files and Batch Processing

Save Files

The save file is a tool in Connexion used to retain unfinished original or copy cataloging records for additional editing or processing. It can also be used to manage multi-person workflows. Connexion Client has two types of save files: Online and Local.

Online Save File

The online save file is maintained on OCLC's servers. There is one save file per institution, and it is accessible to everyone at the institution with Connexion access. It is set up automatically, and provides shared access to everyone in your institution. It can only be used for online (i.e. one at a time) cataloging and does not support the application of multiple record actions from a list.

Local Save File

The local save file is maintained on your computer. It can also be set up as a shared file on your institution's network hard drive. Files are not automatically deleted or backed up by OCLC, and it supports the application of multiple record actions from a list. Records in the local save file may be used for both online and offline cataloging.

Taking action on multiple records

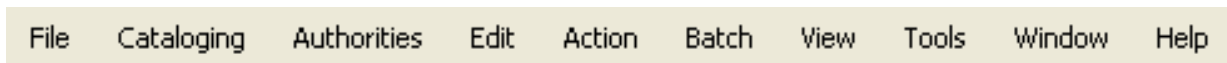
You can take action (e.g. updating holdings, exporting, applying constant data, etc.) on multiple records in a local save file list. Select the records and then apply the action as usual (toolbar button, keystroke shortcut, etc.). To select a range of records, click on the first record, then hold the shift key and click the last record in the range. To select multiple assorted records, hold the shift key and click the individual records you want.

Statuses

Statuses can be used to manage large save files or accommodate multi-person workflows. There are two types of statuses: workflow and "my status". Statuses are searchable in the save file and can be used to identify desired subsets of records.

Menu Commands in Connexion Client

On the menu bar



Working with save files

- **Set up File Locations**
 - **File**>Local File Manager
- **Save a Record to the Local Save File**
 - **Action**>Save Record to local file
- **Save a Record to the Local Save File**
 - **Action**>Save Record to local file
- **Retrieve from Local Save File**
 - **Cataloging**>Search>Local Save File>(Enter search parameters)
- **Retrieve from Online Save File**
 - **Cataloging**>Search>Online Save File>(Enter search parameters)
- **Retrieve by status, source, etc.**
 - **Cataloging**>Show>By Local (or Online) Save File Status
- **Delete a Record from the Save File**
 - **Action**>Delete Record

Using Connexion statuses

- To Set a Status on Individual Records
 - **Action**>Set Status
- To Set a Default “My Status”
 - **Tools**>Options>My Status (tab)

Customizing the display of lists in Connexion Client

Works on Save File lists and Search Result lists

To Modify List Appearance

- Open a list
- Right click anywhere in the list and choose “list settings”
- Uncheck boxes next to columns you don’t want to see.
- To change a column’s position in a list, click the column then click “Move Up” or “Move Down”
- Click “OK” to make the changes

Reset the list to default settings

- Right click anywhere in the list and choose “list settings”
- Click “Reset”, then “OK” to make the changes

Resize list columns

- Hover cursor above lines that divide column headings
- When cursor changes to black double-arrow, click and drag to resize

Resort list columns

- Click on column heading you want to sort by

Setup before Batch Processing

- **Tools>Options>Authorizations**
 - Must have an authorization set as the default to work in batch mode
- **Tools>Options>General>Offline Cataloging Options**
 - Classification Scheme (Dewey, LC, etc)
 - Holding Library Code (if you do not know your holding code, it can be found in the 049 field during online processing)
 - Institution Symbol (Your OCLC Symbol)
 - MARC Organization Code (required for NACO libraries only)

Note: These settings do not affect your online settings, which are determined from your institution’s profile

- **Tools>Options>Batch**
 - Number of matches to download
 - Retain search keys for failed searches (Checking both boxes is recommended)
 - Record Actions
 - Display/Print Batch Reports Automatically

The Batch Searching Process

Enter Search Keys

- **Batch>Enter Bibliographic Search Keys**
- Enter search keys
 - Note local bib file name
- Save and Close

Process Batch Searches

- **Batch>Process Batch**
- Choose file
 - Retain file selection if desired
- Process box
 - Select “Online searches”
- Click **OK**
- Batch Report
 - Print or close
 - Only last report is saved

Take Actions on Batch Records

- **Cataloging>Search>Local Save File**
- Choose correct record(s)
- Select desired action (update, produce, etc)
 - Note “R” in status bar next to selected actions
- Pending actions saved automatically
- Can be done simultaneously with editing
- Can be done one at a time or multiple records at once
 - Ctrl + click to select multiple records
 - Shift + click to select a range of records
- Exports are added to export file immediately, unless Bibliographic Record Export is selected on Tools>Options>Batch menu

Process Batch Record Actions

- **Batch>Process Batch**
- Choose file
 - Retain file selection if desired
- Process box
 - Select “Online Record Actions”
- Click **OK**
- Batch Report
 - Print or close
 - Only last report is saved

Batch Processing by OCLC Number

This is a fast way to delete holdings.

- **Batch**>Holdings by OCLC Number
- Enter OCLC numbers
 - Import text (.txt) file
 - OR, Enter manually
- Choose appropriate record action
- Click **OK**

Selected Toolbar Shortcuts



Save Record to Local File (not on default Connexion toolbar)



Save Record to Online File (not on default Connexion toolbar)



Set Status (not on default Connexion toolbar)



Search Local Save File



Search Online Save File



Delete Saved Record

Selected Default Keystroke Shortcuts in Connexion Client

Local Save File

- Save to Local File.....<F4>
- Search Local File.....<F3>
- Delete Record from Local File.....<Ctrl> <Alt> <D>

Online Save File

- Save to Online File.....<Ctrl> <Alt> <V>
- Search Online File.....<Ctrl> <F3>
- Delete Record from Online File.....<Ctrl> <Alt> <D>

Statuses

- Set Status.....<Alt> <Shift> <S>

Record Actions

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

Constant Data

- Create New Constant Data<Ctrl> <Shift> <N>
- Apply Default Local Constant Data<Ctrl> <Y>
- Apply Constant Data by Name.....<Ctrl>
- Search Local Constant Data<Ctrl> <L>

Navigating within a record

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

Editing Text

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

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

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

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

Resources

- **Batch Processing in the Client: Overview**
<http://www.oclc.org/content/dam/support/connexion/documentation/client/basics/batchprocessing/batchprocessing.pdf>
- **Manage Local Files**
<http://www.oclc.org/content/dam/support/connexion/documentation/client/basics/localfiles/localfiles.pdf>
- **Take Actions on Bibliographic Records**
<http://www.oclc.org/content/dam/support/connexion/documentation/client/cataloging/bibactions/bibactions.pdf>