Connexion Client Module 1: WorldCat, MARC and Client Basics

Introduction

This module provides foundational knowledge about OCLC, WorldCat and Connexion client software. At the end of this module, learners will be able to set up and navigate in Connexion client, to retrieve and interpret data in MARC bibliographic records, and to perform basic copy cataloging tasks.

Menu commands in Connexion client

On the menu bar:

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

Navigate in Connexion client

- Navigate Among open Windows
  - Window > (choose the open window you want to see)
- Make a record stay open when moving to a new search or to display records side by side for comparison
  - View > Pinned
- Minimize search lists so they are not displayed with the records

Review settings in Tools > Options

- Set Authorizations: store authorization/password for automatic sign-in and to use with batch processing activities. (computer-specific)
  - Tools > Options > Authorizations
- Set a startup option to occur when Connexion client opens
  - Tools > Options > General > Startup Options…

Choose an input method

- If you use the command on occasion, use the menus
- If you use the command daily, use the toolbar
- If you use the command on every record, learn the keystroke shortcuts
**MARC structure for a variable field**

- **Tag**: 245
- **Indicators**: 1 0
- **Field**: Sample title; a sample for copy cataloging, c by O.C. Elsee

### MARC fields for copy cataloging

<table>
<thead>
<tr>
<th>Field</th>
<th>Tag</th>
<th>Indicators</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>040</td>
<td></td>
<td></td>
<td>Cataloging Source&lt;br&gt; ‡a Original cataloging agency (who created the record identified by OCLC symbol).&lt;br&gt; ‡b Language of cataloging&lt;br&gt; ‡e Description conventions (cataloging rules)&lt;br&gt; ‡c Transcribing agency (who entered the record, identified by OCLC symbol)&lt;br&gt; ‡d Modifying agency (Institution(s) that edited the record)</td>
</tr>
<tr>
<td>245</td>
<td></td>
<td>1 0</td>
<td>Title Statement&lt;br&gt; ‡a Title&lt;br&gt; ‡b Remainder of title&lt;br&gt; ‡c Statement of responsibility, etc.</td>
</tr>
<tr>
<td>250</td>
<td></td>
<td></td>
<td>Edition Statement&lt;br&gt; ‡a Edition statement</td>
</tr>
<tr>
<td>260</td>
<td></td>
<td></td>
<td>Publication, Distribution, etc. (prefer field 264 for RDA &amp; all new cataloging)&lt;br&gt; ‡a Place of publication, distribution, etc.&lt;br&gt; ‡b Name of publisher, distributor, etc.&lt;br&gt; ‡c Date of publication, distribution, etc.</td>
</tr>
<tr>
<td>264</td>
<td></td>
<td></td>
<td>Production, Publication, Distribution, Manufacture, and Copyright Notice&lt;br&gt; ‡a Place of production, publication, distribution, manufacture&lt;br&gt; ‡b Name of producer, publisher, distributor, manufacturer&lt;br&gt; ‡c Date of production, publication, distribution, manufacture, or copyright notice</td>
</tr>
<tr>
<td>300</td>
<td></td>
<td></td>
<td>Physical Description&lt;br&gt; ‡a Extent&lt;br&gt; ‡b Other physical details&lt;br&gt; ‡c Dimensions</td>
</tr>
<tr>
<td>490</td>
<td></td>
<td></td>
<td>Series Statement&lt;br&gt; ‡a Series statement&lt;br&gt; ‡v Volume number/sequential designation</td>
</tr>
</tbody>
</table>
Test your knowledge

1. If you edit a record in Connexion, the changes you make are automatically reflected on the WorldCat record for others to use.
   a. True
   b. False

2. What information can be found in field 040? (check all that apply)
   a. The OCLC symbol of the institution who created the record and added it to WorldCat
   b. The Library of Congress control number for the record
   c. The Dewey Decimal classification number
   d. The language of cataloging for the record’s description
   e. OCLC control numbers of merged records

3. What is the best way to see both a toolbar button and a function key for a command?
   a. Check the documentation for the command you want to perform
   b. Hover over each toolbar button to see the corresponding command
   c. Open the menu where the command is located to see both the toolbar button and the function key
   d. Ask your co-worker for help

4. How can you compare multiple record from a results list?
   a. Display and print each record you want to review
   b. View and pin the first record, then repeat the process to view and pin additional records
   c. This cannot be done in Connexion Client
   d. Use Windows > Tile vertically to display records from the results

5. Where can you enter your cataloging authorization to be set as the default authorization in Connexion client?
   a. Tools > Options
   b. File > Logon
   c. Edit > Constant data
   d. Actions > Holdings
   e. Cataloging > Search
6. What is the basic copy cataloging workflow? (fill in the boxes below)
Bonus: what menu would you use to complete these tasks?

7. Where is the start-up option so Connexion will automatically logon and open Search WorldCat?
   a. Tools > Options
   b. File > Logon
   c. Edit > Constant data
   d. Actions > Holdings
   e. Cataloging > Search

8. Match the MARC fields with their definitions:
   a. 040 ______ Physical description
   b. 245 ______ Production, publication, distribution, and copyright
   c. 250 ______ Cataloging source
   d. 264 ______ Title
   e. 300 ______ Edition statement
Documentation

Quick Reference: Cataloging in Connexion Client
Brief instructions for most cataloging functions in Connexion client. Includes lists of default keystroke shortcuts and toolbar buttons.
https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_3_0/Reference/Quick_reference_Cataloging_in_Connexion_client

Function Key Template for OCLC Connexion Client
Template with functions keys (and definitions) used in Connexion client. Available in printer-friendly format that can be affixed to workstation keyboard.

Bibliographic Formats and Standards
A guide to the structure, coding practices, and input standards used in bibliographic records in the WorldCat® database. It provides definitions, guidelines, and examples for entering information into WorldCat.
https://www.oclc.org/bibformats/en.html

Check your answers…
Check your answers…

1. If you edit a record in Connexion, the changes you make are automatically reflected on the WorldCat record for others to use.
   b. False

2. What information can be found in field 040? (check all that apply)
   a. The OCLC symbol of the institution who created the record and added it to WorldCat
   d. The language of cataloging for the record’s description

3. What is the best way to see both a toolbar button and a function key for a command?
   c. Open the menu where the command is located to see the toolbar button and the function key

4. How can you compare multiple record from a results list?
   b. View and pin the first record, then repeat the process to view and pin additional records

5. Where can you enter your cataloging authorization to be set as the default authorization in Connexion client?
   a. Tools > Options

6. What is the basic copy cataloging workflow? (fill in the boxes below)
   Bonus: what menu would you use to complete these tasks?
   A. Search WorldCat (Cataloging menu); Edit records (Edit menu); Set holdings & Export (Action menu)

7. Where is the start-up option so Connexion will automatically logon and open Search WorldCat?
   a. Tools > Options

8. Match the MARC fields with their definitions:
   a. 040 ______ e ______ Physical description
   b. 245 ______ d ______ Production, publication, distribution, and copyright
   c. 250 ______ a ______ Cataloging source
   d. 264 ______ b ______ Title
   e. 300 ______ c ______ Edition statement