Introduction to Connexion client

Crystal Rodriguez
Member Education
Agenda

• OCLC at a glance
• WorldCat at a glance
• The copy cataloging workflow
• Starting Connexion client
• Working with list of records
• Online Help and Support
OCLC at a glance

**Founded**
1967 as a nonprofit, member-driven library community

**Members**
30,000 in 100+ countries

**Library types served**
Research, academic, public, school, medical, law, corporate, government, special, state and national libraries, groups and consortia

**Major services**
Library management, discovery, cataloging, digital libraries, virtual reference, resource sharing

**Scope**
40+ million search requests processed each day by OCLC systems

**Research**
OCLC Research focuses on research collections and support, understanding the system-wide library, data science and user studies.

**Community programs**
WebJunction™, Outside the Box™, Geek the Library™

Breakthroughs depend on access to knowledge. Together, member institutions, individual librarians, partners and staff believe in that mission to share knowledge. And we believe that, together, we can do more.

**Because what is known must be shared.**

About OCLC: [https://www.oclc.org/en/about.html](https://www.oclc.org/en/about.html)
WorldCat®
is the world’s largest bibliographic database filled with millions of popular and unique items

Cataloging Interfaces to WorldCat

Connexion client

Record Manager

WorldCat
WorldCat record vs. working copy of record

- **WorldCat records**
  - Each manifestation of a title has one WorldCat record
  - Libraries attach holdings to matching WorldCat record

- **Working copy of record**
  - Enables multiple libraries to view same record simultaneously
  - Edits do not affect the WorldCat record.
  - Use Export to transfer your edited record to your local catalog
The Copy Cataloging Workflow

Task: Find a Matching Record
Menu: Cataloging

Task: Edit Records (optional)
Menu: Edit

Task: Set Holdings & Export Record
Menu: Action
Record match fields

Compare information in these fields against the item you want to catalog

- 245 (title)
- 250 (edition statement)
- 260 or 264 (publisher)
- 300 (physical description)

A significant difference in any of these fields between the item to be cataloged and the bibliographic record means that the record is NOT a match.
QUESTIONS & ANSWERS
Where can you enter a default authorization and setup start options for Connexion client?

PICK ONE

A. Tools > Options
B. File > Logon
C. Actions > Holdings
D. Cataloging > Search
Where can you enter a default authorization and setup start options for Connexion client?

PICK ONE

A. Tools > Options
B. File > Logon
C. Actions > Holdings
D. Cataloging > Search
Which photo demonstrates the correct menu order for the copy catalog workflow?

A.

Find a Matching Record
Menu: View

Edit Records (optional)
Menu: Edit

Set Holdings & Export Record
Menu: Edit

B.

Find a Matching Record
Menu: View

Edit Records (optional)
Menu: Edit

Set Holdings & Export Record
Menu: Action
Which photo demonstrates the correct menu order for the copy catalog workflow?

A.
- Find a Matching Record
  - Menu: View
- Edit Records (optional)
  - Menu: Edit
- Set Holdings & Export Record
  - Menu: Edit

B.*
- Find a Matching Record
  - Menu: Cataloging
- Edit Records (optional)
  - Menu: Edit
- Set Holdings & Export Record
  - Menu: Action

*Correct answer: B.
If you edit a record in Connexion, the changes you make are automatically reflected on the WorldCat record for others to use?
If you edit a record in Connexion, the changes you make are automatically reflected on the WorldCat record for others to use?

Answer: False
Questions?

Contact OCLC Support in your region
https://help.oclc.org

1-800-848-5800
Thank you!

- Contact Training: training@oclc.org