

Welcome

Connexion *Client 4*: Save files and batch processing

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Learning objectives

- Working with online and local save files
- Connexion online & offline cataloging
- Local file management and setup for offline cataloging
- Offline cataloging processes:
 - Enter bibliographic search keys
 - Take actions on save file records
 - Process holdings by OCLC number

Types of save files

- **Online** – Files stored at OCLC (optional)
- **Local** – Files stored on your computer or network hard drive (required for batch processing)

Processing options

Method	Characteristics
Connexion online processing	Evaluate and/or edit one record at a time
Connexion offline processing	Evaluate and set actions on multiple records to process as a group

Batch Processing Workflow

- Enter bibliographic search keys
 - Use numeric, keyword, derived, and/or phrase searches
 - Use qualifiers when needed
 - Import a file
- Edit records (optional)
- Set Actions (update holdings, delete holdings, export)

Which type of save file is required for batch processing?

- A. Online save file.
- B. Local save file.

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B. Local save file.

Which of the following is true about local save files?

- A. You can create multiple local save files.
- B. You can change the list settings and sort local save file results.
- C. Local save files are required for batch processing.
- D. All of the above.

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- B. You can change the list settings and sort local save file results.
- C. Local save files are required for batch processing.
- D. All of the above.

Which is a list of actions that can be performed in batch?

- A. Search, edit, update holdings, delete holdings, export
- B. Search, derive new records, add fields
- C. Search, delete holdings, create new records

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B. Search, derive new records, add fields

C. Search, delete holdings, create new records

Questions?

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Thank You!

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- Instructor: Crystal Rodriguez
- Category: Cataloging and Metadata
- Class name: Connexion client 4 – Save files and batch processing

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)