

Welcome

Connexion *client 5*: Automation and customization

Member Education

Learning objectives

- Use Automation tools
 - Create and apply constant data records
 - Create and apply text strings
 - Apply OCLC-supplied macros
 - Record and apply custom macros
- Use Customization tools
 - User tools
 - Toolbar editor
 - Keystroke shortcuts

Automation Tools

- Constant data
 - Create and apply MARC-formatted constant data records to add standard content to bibliographic records without having to re-key.
- Text strings
 - Text strings supplement constant data for entering frequently used, brief data anywhere in a record.
- Macros
 - short programs to automate repetitive, multi-step actions. Macros are built from commands.

Determine which automation tool fits your workflow

Will the data be applied to a specific record format type or is it text that will be used despite the record format type?

What information will be added to the record? Is it a single field, multiple fields, fixed or variable field data, or a subfield?

Will the data be shared amongst staff? Will you be working with a batch of records?

Will you be applying multi-step actions or a string of commands?

Use constant data to...

- Apply fixed and/or variable field data to a specific record format type
- Apply to a displayed single record, multiple records, or a workform
- Add regularly repeated content
 - Single field, such as 949 field with order info
 - Group of fields, such as 590, 690, and 949

Note: you can add a descriptive name and “MyStatus” to identify your records

Creating constant data records

- Two methods:
 - Create from a blank workform (online and offline)
 - Derive from an existing WorldCat record (online)
- Use for online or offline processing

Insert blank fields, keep fields, preserve fixed fields

- **Fixed fields:**
 - Add asterisks to preserve the fixed field values in bib record
 - Leave blank or fill character if you DO NOT want to retain existing data
- **Variable fields:**
 - Use one or more placeholder characters; or...
 - To preserve just a delimiter and subfield code, type the delimiter and subfield code followed by **[BLANK]**
 - Enter variable fields anywhere in the record
- Use Reformat when you are finished to remove blanks.

Constant data record with blanks/retention

Books	▼	Rec stat	n	Entered	20240213						
Type	a	ELvl	■	Srcce	d	Audn		Ctrl		Lang	eng
BLvl	m	Form		Conf	0	Biog		MRec		Ctry	
		Cont		GPub		LitF	0	Indx	0		
Desc	i	Ills		Fest	0	DtSt	s	Dates	****		
264	4	≠c BLANK									
500		Title is selected for Reese Witherspoon's Happy Sunshine book club.									
949		≠c Call number	≠g BLANK	≠h 4000	≠i 4000	≠l M09	≠m B3	≠q 9			

Applied constant data with blanks/retention

Books	Rec stat	c	Entered	20200518	Replaced	20240202180208.2
Type a	ELvl	Src	d	Audn	Ctrl	Lang eng
BLvl m	Form	Conf	0	Biog	MRec	Ctry
	Cont	GPub		LitF 0	Indx 0	
Desc i	Ills	Fest	0	DtSt s	Dates 2019	

264	4	#c	
300		253 pages : #b illustrations ; #c 20 cm.	
336		text #b txt #2 rdacontent	
337		unmediated #b n #2 rdamedia	
338		volume #b nc #2 rdacarrier	
490	1	The vampire chronicles	
500		Title is selected for Reese Witherspoon's Happy Sunshine book club.	
600	0 0	Lestat #c (Vampire), #d 1760- #v Fiction.	
650	0	Vampires #v Fiction.	
650	6	Vampires #v Romans, nouvelles, etc. #0 (CaQQLa)201-0300230	
600	0 7	Lestat #c (Vampire), #d 1760- #2 fast #0 (OCoLC)fst00996665 #1 htt	
650	7	Vampires. #2 fast #0 (OCoLC)fst01163968	
655	7	Fiction. #2 fast #0 (OCoLC)fst01423787	
655	7	Horror fiction. #2 fast #0 (OCoLC)fst01921684	
655	7	Horror fiction. #2 lcgft	
700	1	Geyer, Mark Edward, #e illustrator.	
758		#i has work: #a Blood communion (Text) #1 https://id.oclc.org/worldca	
830	4	The vampire chronicles	
949		#c Call number #g #h 4000 #i 4000 #l M09 #m B3 #q 9	

Use text strings to..

- Enter frequently used, brief data
 - Insert common elements like subfield text, a location, or a local note
 - Add variable fields or parts of fields
 - Include tags, indicators, delimiters, subfield codes, diacritics and/or special characters
 - Single or multiple lines/fields

Notes:

- Apply text in displayed record at cursor position
- no character limit
- Stored offline

Use macros to..

- Automate repetitive, multi-step actions
 - Built from commands (e.g., Add holdings, then Export)
 - Use OCLC-supplied macros
 - Add macros created by others
 - Create your own macros (record or use macro language)

Which is true about constant data?

- A. Can be applied to fixed or variable fields
- B. Can be applied to a group of records
- C. Applies to displayed record or a list of saved records
- D. All of the above

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True or False? Text strings can only be used for variable fields.

- A. True
- B. False

True or False? Text strings can only be used for variable fields.

A. True

B. False

Which option can you use to automate repetitive, multi-step actions, such as strings of commands?

- A. User tools
- B. Macros
- C. Keymaps
- D. Toolbar editor

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Customization Tools

- User tools
 - Assign for easy access to menus and customized commands
- Toolbar editor
 - Edit the toolbar to meet your specific workflow needs
- Keymaps
 - View, create, edit, and restore keystroke shortcuts

Questions?

<https://help.oclc.org>

OCLC

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How can we help you?

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OCLC support regions

Region	Location	Contact information
Asia Pacific	OCLC Asia Pacific 6565 Kilgour Place Dublin, Ohio 43017 US	O: +1-614-764-6009 Send an email Submit/View requests
Australia and New Zealand	OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU	T: 1300 260 795 (local call w O: +61 (0) 3 9929 0800 Send an email Submit/View requests
United States	OCLC Support—United States 6565 Kilgour Place Dublin, Ohio 43017 US	T: 1-800-848-5800 (toll free in USA and Canada) O: +1-614-793-8682 Send an email Submit/View requests

Thank You!

Please remember to fill out the evaluation for this class

- Instructor: Crystal Rodriguez
- Category: Cataloging and Metadata
- Class name: Connexion client 5 – Automation and customization

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