**OCLC Connexion Text Strings and Macros**

**What is a text string?**

A shortcut that can be used to insert a portion of a field’s data, an entire field, or multiple fields.

* Text strings can be created by the user or can be shared by copying and pasting
* They are stored in your OCLC log in, so if you change computers your text strings will remain
* Can include diacritics or special characters

When entering your text strings:

* They must be named; keep it short
* Spacing is important
* My 020 has a space before the $q so that when I click at the end of the ISBN the string is inserted correctly
* When entering a field with no indicators there should be two spaces between the tag and the data in the field
* When entering a field with both indicators, and no delimiter at the beginning of the field there should be no spaces
* When entering a field with one indicator there should be a space for the absent indicator
* If you create a text string and see when you enter it that the spacing is off, you can open the macro, make changes, and click ok until you get it right
* 34X fields for DVDs & Blu-rays contain a place holder of “Aspect ratio” and fields that can potentially be used in a record. I insert the string and remove any of the fields that do not apply to my record and insert the aspect ratio of the item if present, if not the field is deleted
* When I worked on a number of similar test prep books, I created a text string for the publisher and one for the subject headings

Once text strings are created:

* Navigate to Tools > Text Strings, select a text string, and use the Apply button
* Navigate to Tools > Text Strings, select a text string, and use the Keymaps or User Tool button to assign to a keystroke or user tool
* In the Text Strings quick tool, which displays by default on the toolbar, click the arrow next to the right to view the list, and then click a text string to insert it (the method I use)

Link to text string page:

<https://help.oclc.org/Metadata_Services/Connexion/Connexion_client/Connexion_client_basics/Set_options_and_customize/Create_custom_text_strings/10Work_with_text_strings>

<https://help.oclc.org/Special:Search?qid=&fpid=230&fpth=&query=text+strings&type=wiki>

**What is a macro?**

A shortcut that can automate a frequent or repetitive task.

**Where to find macros in OCLC Client Connexion**

Tools>Macros>Manage

Click on the plus sign next to Dewey or OCLC to open. Click the minus sign to close.

To use:

* Insert a blank field
* Highlight the macro you want to use
* Click run
* Generate 043 will insert the geographic area code automatically based on the headings in the 6XX fields
* Add 33X will open a pop-up box, click ok
* Add & edit 007 will guide you each subfield in the 007

Many SHARE catalogers have found that the macro for adding the 33X fields sometimes freezes up. OCLC is aware of the problem and has instructions to unfreeze (see the link for troubleshooting tips below). Due to this most of us have stopped using the 33X macro and have created a text string instead.

**Link to Macros page**

* <https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_version_263/Connexion_client_macros>
* This link also contains downloadable macros created by OCLC users
* CAUTION – Macros are stored on *your* computer. If you get a new computer, they will need to be transferred. Instructions for transferring macros and other troubleshooting tips can be found at: <https://help.oclc.org/Special:Search?qid=&fpid=230&fpth=&query=macros&type=wiki>

**Link to OCLC training**

* <https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_training/Connexion_client_live_and_recorded_classes>
* Module 1 WorldCat, MARC, and client basics
* Module 2 - Basic bibliographic searching
* Module 3 - Basic editing and record processing
* Module 4 - Save files, file management, and batch processing
* Module 5 - Automation and customization
* Module 6 - Editing WorldCat records
* Module 7 - Advanced bibliographic searching
* Module 8 - Original cataloging
* Module 9 - Authority control