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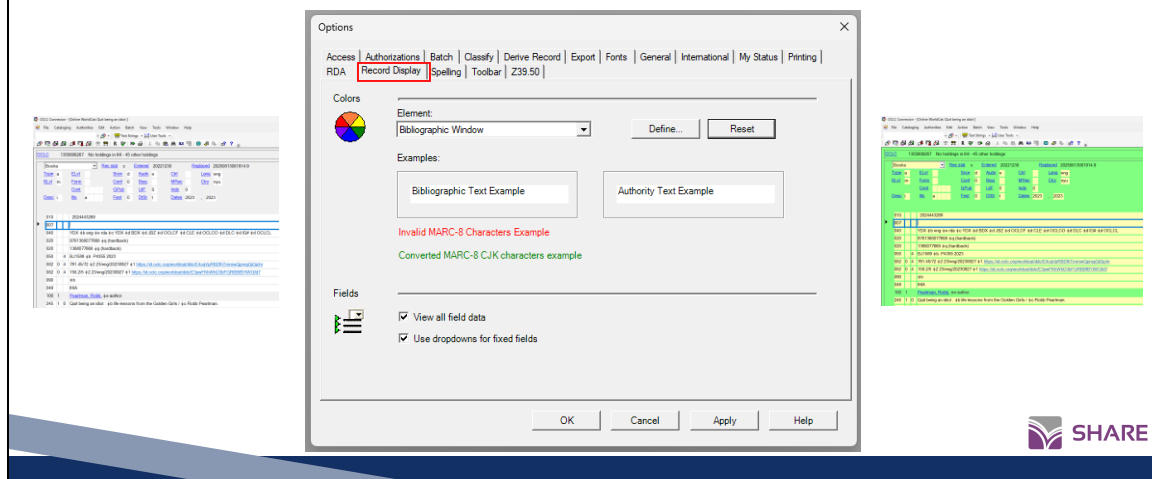
Connexion, MARC Report, and Cataloging Tips

SHARE Catalogers

Cataloger's Training Session – August 2026

Sharing Heartland's Available Resources Equally

Customizing the Connexion Display



[Charlie]

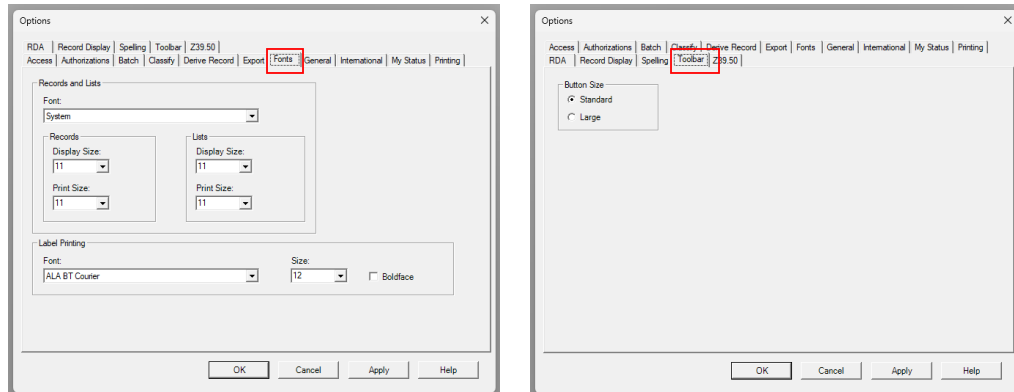
{open Connexion, have bib records available in Local Save File for use in Connexion}

Today we're going to talk about some tips and tricks that you might find helpful when using OCLC Connexion and MARC Report. We were all newbies at one point and we're all still learning, so we'll be curious to find out which of these tips are new to you—and we hope you'll share your own tips & tricks in the chat and during the Q&A at the end of the presentation!

The first area we're going to look at today is literally the most colorful one, as we review how to customize the display settings of Connexion.

Selecting **Options** from the **Tools** drop-down menu, you'll see multiple tabs for setting your preferences. The three display-related tabs we'll be looking at are **Record Display**, **Fonts**, and **Toolbar**. On this slide you see the **Record Display** tab, along with a before and after example of a color change to the display.

Customizing the Connexion Display



SHARE

[Charlie]

And here you can see the **Fonts** tab and the **Toolbar** tab. *{Now we're going to switch to Connexion to demonstrate this function.}*

From the **Record Display** tab, you can change the colors of certain elements:

- **Bibliographic Window:** the frame around the fields *{change from gray to green, press <Apply>}*
- **Bibliographic Text:** must close and reopen to see change in record; you can see it in the "Examples:" area and the fixed fields but not yet in the other record fields *{change to something garishly purple}*
- **Bibliographic Field:** the background of the fields *{change from white to pale yellow, press <Apply>}*

Note that in our list of elements, there are settings for authority records as well as bibliographic records *{drop down Element list to show authority record options}*. If you regularly work with both authority and bibliographic records, setting different colors can help you easily distinguish which type of record you

have open.

From the **Fonts** tab, you can change the display size of fonts in both records and lists.

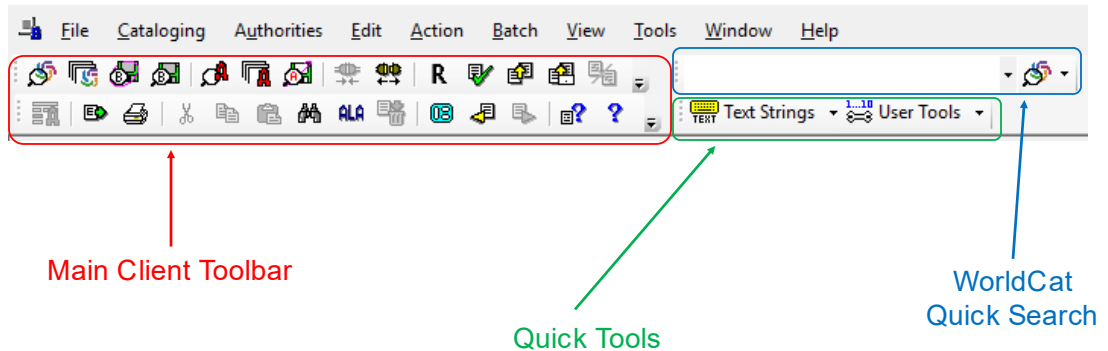
After you've changed that display size, click <Apply>. ***{Change from 11 to 14 in "Records Display Size"; press <Apply>}*** You'll notice that the height of the boxes changes, but not the actual font size—you'll need to close the record, then reopen it to see the font size change in a record (though not in a list). ***{Close record, reopen record to demonstrate font size change}***

As you can see, the font default is "System"; you can change the font, but if it's not a Unicode font, it may not display diacritics or non-Latin scripts accurately.

From the **Toolbar** tab, you can't do much, but what you can do is change the size of the buttons to either "Standard" (the default) or "Large" (which are REALLY large). Once again, you won't see that button size change until you not only close your records, but the entire OCLC client. ***{Change to large buttons, press <Apply>, <OK>; close Connexion; reopen Connexion; repeat process after changing back to standard buttons}***

But there is much more we can do to the Connexion Toolbar from the Toolbar Editor! ***{switch back from Connexion to slideshow}***

Editing the Connexion Toolbars



[Charlie]

The **Connexion Toolbar** is actually three separate toolbars:

- the main client toolbar
- the WorldCat Quick Search window, and
- Quick Tools

{switch to Connexion to demonstrate}

If all three do not appear in your Connexion, simply go to the **View** drop-down menu, select **Toolbars**, and make sure all are checked

To move the toolbars. select the light gray dots and drag (client toolbar buttons can go on the side!). ***{move the toolbars around, then move the buttons to the side and back}***

To show the buttons on two rows (or back to one), select the drop-down arrow to change. ***{change to two rows, change back to one}***

Toolbar Editor: From the **Tools** drop-down menu, select **Toolbar Editor...** This allows you to remove unhelpful and/or potentially unpleasant buttons, as well as generally customize the toolbar to match your work patterns and preferences.

To remove a button from the toolbar, drag the button down into the Toolbar Editor window. ***{remove the FileLogon and FileLogoff buttons}***

To add a button to the toolbar, draft the button from the Toolbar Editor window to where you want it on the Toolbar —(please note that you can't edit its position after it has been added!) ***{drag the ViewPinned button onto the toolbar}***

As you might guess, you might want to plot out which buttons you want on your toolbar, as well as where they'll appear before you start customizing it.

To reset back to the default settings, press <Reset> from the Toolbar Editor. ***{DO NOT hit Reset, because I want to keep the ViewPinned button}***

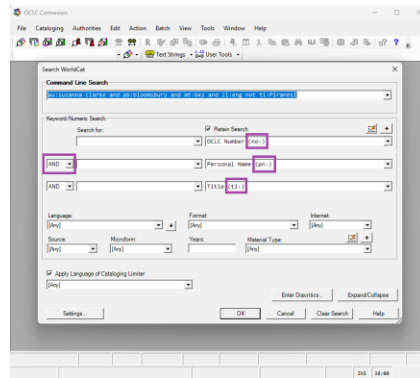
I'm going to stop sharing now and turn it over to Quinn for more fun with Connexion.

{turn it over to Quinn, move slide show to Viewing Multiple Records slide}

Command-line searching

Examples:

- **au:** Author/name
- **pb:** Publisher
- **mt:** Material type
- **ll:** Language of cataloging
- **yr:** Year
- **ti:** Title
- **AND, OR, NOT**



[Quinn]

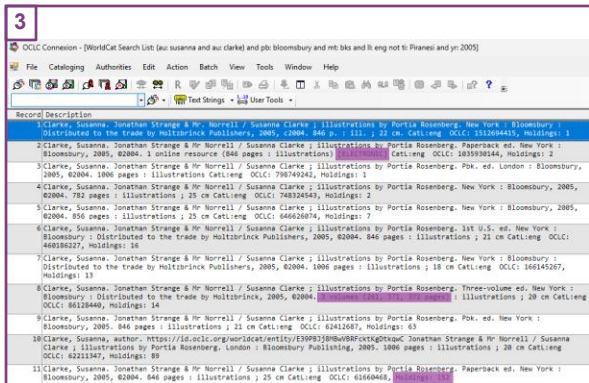
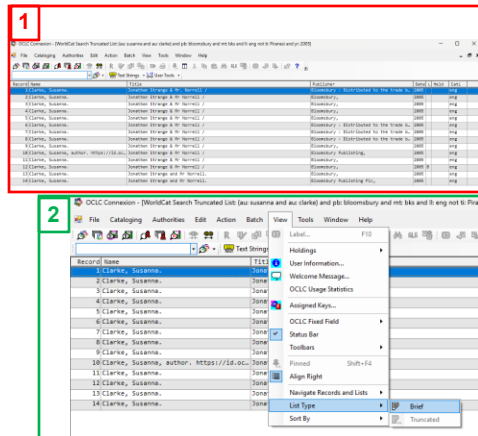
One way of searching in Connexion is through command-line searching. This isn't something I normally use, but it could be useful when you need more search criteria than the guided keyword search provides.

The different command-line codes appear next to the search fields, and the Boolean operators are available in the drop-down menus. So if you don't remember a code, this is a good place to look.

An example search you could do is something like:

au:susanna clarke and pb:bloomsbury and mt:bks and ll:eng and yr:2005 not ti:Piranesi

OCLC Search Results



[Quinn]

So once you've performed your search., here are a few ways to work with a results list without opening and closing records repeatedly.

Number 1 shows the standard **truncated** results list. It gives you a quick way to compare records and see whether there are obvious differences before opening them.

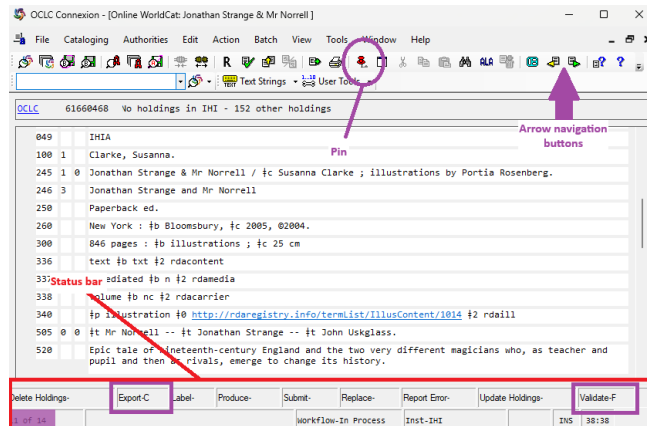
Another way you can view results through a **brief** list. Box number 2 shows how you can change your view type: go to the View menu, then down to **List Type**

Finally, the third box shows what the **brief** view looks like. It shows a bit more of the bibliographic record.

In this view, some of the key things I look for first are the number of holdings and the type of material, while keeping an eye out for anything weird. Those can help narrow down which records are worth opening for a closer look.

This search only returned 11 results, but if you get a lot of results from your search, it's usually best to go back and refine your search rather than working through page after page of records.

Navigating Records



[Quinn]

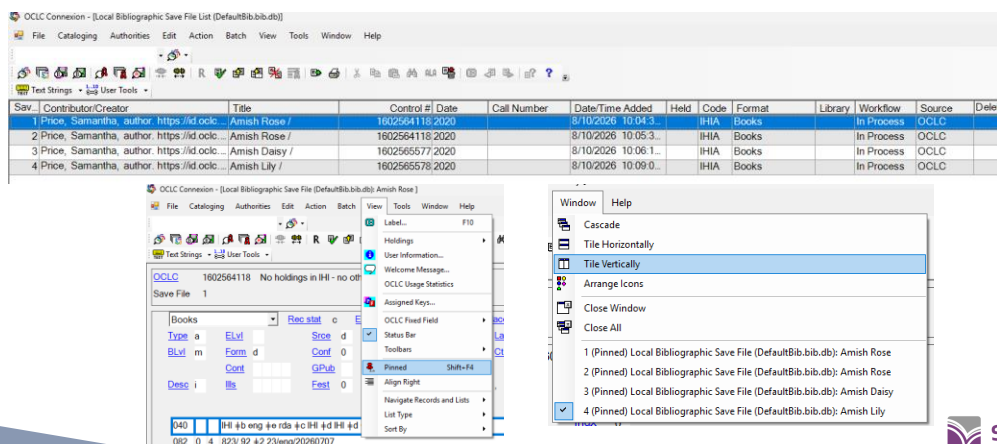
When you open up a record in Connexion, there is a status bar at the bottom of Connexion. It shows useful things like which record you have open, such as record 11 of 14, and the status of different actions. For example, the C next to Export means the export completed successfully, while the F next to Validate means validation failed. When something fails, you'll usually also get a popup message to go along with it.

Once you open a record, you can move forward or backward through the results using the arrows on the toolbar without going back to the list each time.

These work well when you've already narrowed the search to a manageable number of possible matches and want to compare them more closely.

I also find the **Pin** button really useful when comparing records. It keeps the current record locked so you can go back, search again, and open another record without losing the one you were looking at.

Viewing Multiple Records



[Charlie]

So what does it look like to open and pin multiple records? And when does this come in handy?

One scenario will be when you find two very similar items in your search results and you want to review the entire records of each to decide which you're going to use.

Another scenario is when when you have a number of very similar items to catalog—such as a number of Harlequin romances, or a series of children's nonfiction items. By having multiple records open, you can compare the records more easily, and you can ensure that you're treating various fields in a consistent fashion. You could go field by field for all the records, or get one record in the shape you want it, then use it as a guide for the remaining records.

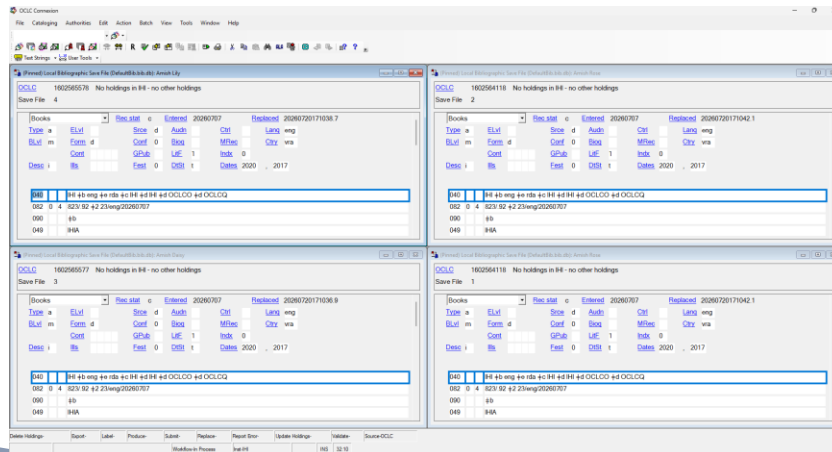
After you've added the multiple records to your local or online save file, you can then pin each one by going to each record and selecting **Pinned** from the **View** drop-down menu or by using the **ViewPinned** button on the main client toolbar.

Once you've pinned all of those records, you can then close the save file.

To view all of the pinned records at the same time, go to the Window drop-down menu and select Tile Horizontally or Tile Vertically (or even Cascade if that's your preference). You can play with this to find what works best for you (I find that more than two records, either vertically or horizontally, can be difficult to manage, but two in either direction are nice.)

On the next slide, we'll see what four records viewed simultaneously looks like.

Viewing Multiple Records

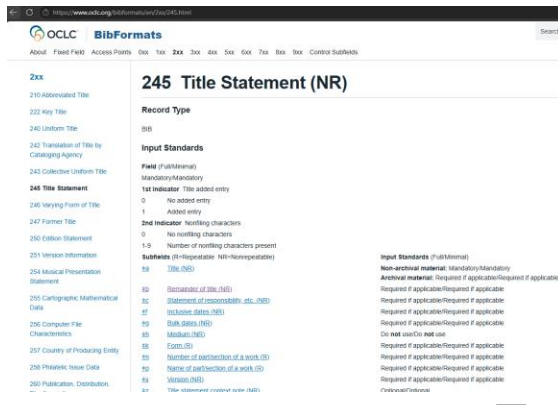
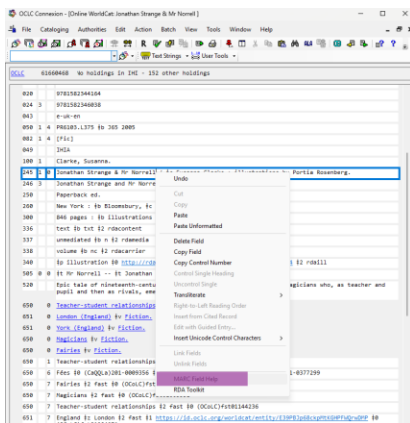


[Charlie]

Now we'll walk through the function in Connexion. ***{Open local save file to run through this process}.***

I'm going to turn it back to Quinn for the next couple of slides. ***{stop sharing, advance to Text Strings in Connexion slide}***

MARC Field Help



[Quinn]

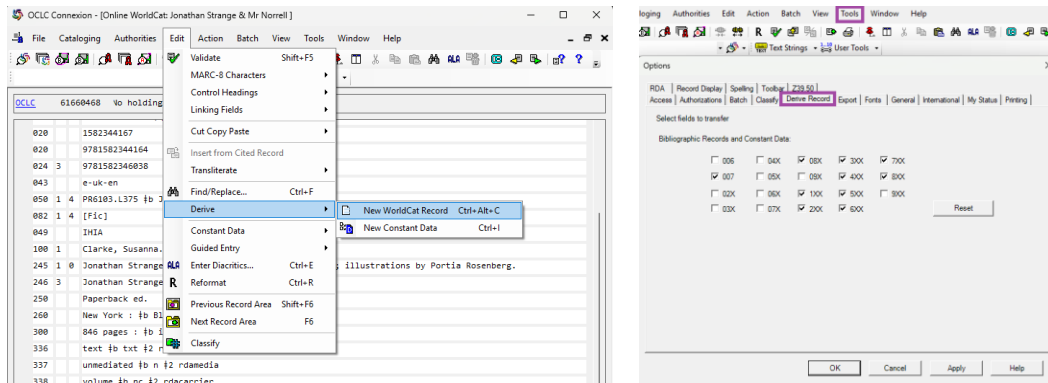
If you need a quick way to get MARC field help in Connexion, you can just right-click in the field you have a question about and select **MARC Field Help** from the menu.

You can also place the cursor in the field and press Shift+F1.

Either way, Connexion opens the OCLC documentation for that specific field. In this example, it opens the page for the 245 field.



Deriving New Records



[Quinn]

Connexion lets you easily derive a new record from an existing one, which can save time when you're working with a closely related edition or version because you don't have to start fresh.

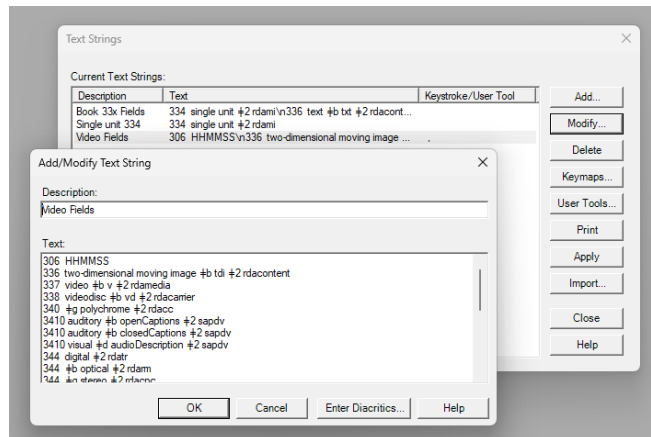
To derive a record go to: **Edit → Derive → New WorldCat Record**. You can also use Ctrl+Alt+C.

Before doing that, though, it's worth checking **Tools → Options → Derive Record**, shown on the right side here. This controls which groups of fields are transferred into the new record.

The default settings mostly carry over the 1XX through 8XX fields, but depending on what you catalog, adding some of the other fields can save repetitive work.

You still want to review anything that carries over, especially fields that may be specific to the edition, format, or publication you started from.

Text Strings in Connexion



[Charlie]

A very helpful function in Connexion that we saw earlier on the Quick Tools Toolbar are the Text Strings. The Text Strings function is simple, but reliable. It simply inserts a string of text at the point where you decide to apply it.

Let me switch to Connexion to show you how that works.

{switch to Connexion}

To see your current list of text strings, from the **Tools** drop-down menu, select **Text Strings**, or even more easily, click on **Text Strings** from the **Quick Tools** toolbar (if not appearing, check it via **View → Toolbars → Quick Tools**).

Too add a new text string, click **<Add...>**, then enter a description of the text string, then the text string itself. Let's pretend this is six months ago, and we're tired of typing "Bildungsromans" in our 655 genre fields. We can add "Bildungsromans" to a text string with a description of **Bildungsromans**.

To apply a text string into a record, once again you can use either the **Quick Tools** toolbar or the drop-down menus (**Tools → Text Strings**). With the cursor placed at the point in the record where you'd like the text string to begin (to start a new field, enter a blank line, then place the cursor in the tag area), select the text string, then click **<Apply>**.

Let's take a look at another example of one of these text strings, by selecting one and clicking **<Modify...>**. The examples here are text strings for entire fields, including the tag, indicators, delimiters, subfield codes and subfield data. And as you can see, we can add multiple fields (which is very handy for 3XX fields!).

You can see how we go straight from the 3-digit tag to the two indicator digit places to the subfields (delimiter, codes, and data). A line break in this area will separate the fields.

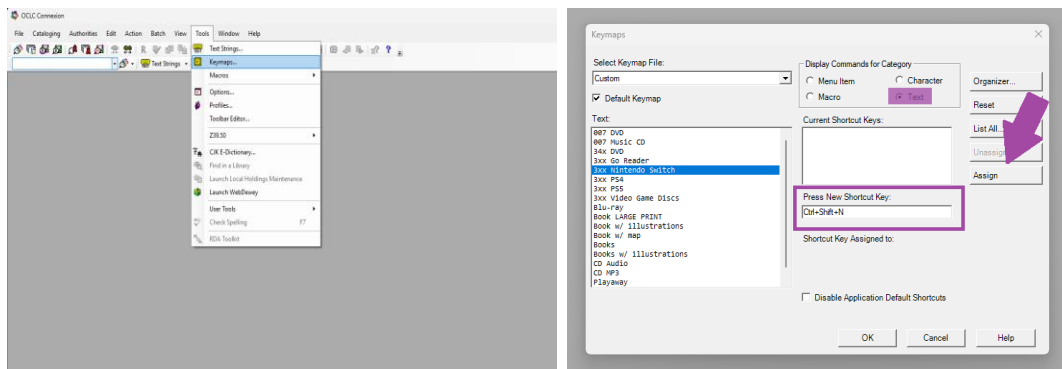
You'll also notice that the list of text strings is alphabetized by the descriptions.

From the Text Strings window, you can further modify a text string or delete it entirely from the list. We could remove the cartographic image from our **Book 33x Fields** text string or delete our **Bildungsromans** text string, since it's mercifully been replaced by **Coming-of-age fiction**.

WARNING: Text strings don't travel with your login, but rather with your computer!

In a few moments, Quinn will explain how to assign shortcut keys to text strings.
{turn it over to Quinn}

User-Defined Shortcuts



[Quinn]

Connexion also allows you to create your own keyboard shortcuts.

To do that, go to **Tools**, then **Keymaps**.

You'll want to first make sure you select the category you want to work with at the top. In this example, I've selected **Text**, because I'm assigning a shortcut to a text string. You can also choose Menu Item, Macro, or Character depending on what you want to customize.

From there, select the specific item you want to assign. In the **Press New Shortcut Key** box, press the key combination you want to use. Connexion will show whether that shortcut is already assigned. If it is available, click **Assign**, then click **OK** to save it.

Connexion Keyboard Shortcuts

Shortcut	Action
Shift+F1	Open MARC field help
F11	Control single heading
Shift+F11	Control all eligible headings
Ctrl+E	Open the diacritic and special-characters window
Alt+Arrow keys	Move fields up or down
Ctrl+D	Insert delimiter
Alt+0169	Insert ©
Alt+8471	Insert ®



[Quinn]

These are a few shortcut keys available in Connexion:

- Shift+F1 opens MARC field help for the field where the cursor is placed.
- F11 controls a single heading, while Shift+F11 attempts to control all eligible headings in the record.
- Ctrl+E opens the diacritics and special-characters window.
- You can also use Alt+0169 to insert the copyright symbol and Alt+8471 to insert the phonogram copyright symbol.
- And Alt plus the arrow keys moves fields up or down within the record.

MARC Report Keyboard Shortcuts

Shortcut	Action
Ctrl+Alt+K	Displays available keyboard shortcuts
F1	Shows help for the selected MARC field
F3	Open diacritics and special characters
F5	Insert the copyright symbol
Insert	Add a new field
Ctrl+Delete	Delete current field
Ctrl+D	Insert subfield delimiter
Alt+U	Undo changes



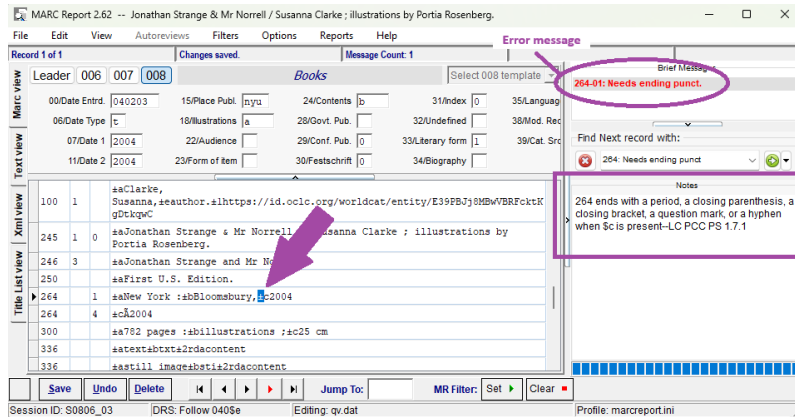
[Quinn]

And finally that gets us to MARC Report. These are some of the shortcuts that could be useful while editing records.

- Ctrl+Alt+K displays the full shortcut list, so you do not have to memorize everything.
- The function keys provide quick access to field help, subfield insertion, and special characters.
- Insert adds and Ctrl+Delete add or remove entire fields, while Ctrl+D inserts a delimiter. Important: To insert a new line, your cursor must be active in an existing field line.
- Alt+U can undo changes.

If you prefer toolbar buttons, you should know that these shortcuts do not have corresponding buttons.

MARC Report Error Messages



[Quinn]

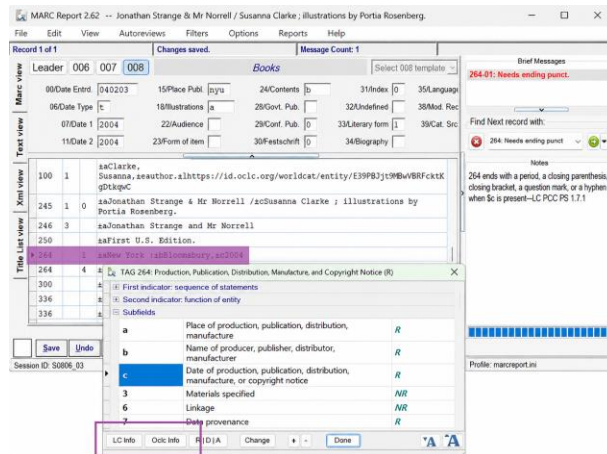
When you encounter an error in MARC Report, it displays an error message in the upper-right panel.

Clicking the red text error message moves the cursor to the field that is throwing the error, so you do not have to search through the record manually.

The Notes panel, in the lower right of the window, gives a fuller explanation and may include the rule being applied or a suggested correction.

In this example, the 264 field is missing its required ending punctuation. After correcting the field, the record can be checked again for any remaining messages.

MARC Report Selected Field Help



[Quinn]

If you have a question about a particular field in MARC Report, pressing F1 opens help for whatever field is currently selected.

In this example, the cursor is in field 264, so MARC Report opens the field definition and shows the valid indicators and subfields.

The LC Info and OCLC Info buttons can also be used to open additional documentation.



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Thank you!

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