

# Using OCLC Connexion to Edit and Create Titles

You can use the **OCLC Connexion to Edit and Create** bibliographic records.

## Follow the steps below to Derive a Master bibliographic record:

1. First, search Symphony WorkFlows for the title.
2. If you do not find a record in Workflows, login to OCLC Connexion.
3. Click Search. Make sure that you are searching the WorldCat catalog.

The screenshot shows the OCLC Connexion interface. A red arrow points to the 'Search' button in the 'Cataloging' tab. The search input field contains '\*182529547'. Below the search field are options for 'Show Bibliographic Record if Single Record Found' and 'Apply Language of Cataloging Limiter Any'. The 'Keyword/Numeric Search' section is also visible with various filters like Language, Mat. Type, Source, Years, Holdings, Format, and Microform.

4. If you do not find a matching record, find a good record. It does not have to be the same title, but the same format will be best. Although, you can choose one format to derive a record into another format.

Examples: The Client by John Grisham (book) to The Client by John Grisham (large print)

Raging Fire (DVD) to Raging Fire (BLU-RAY)

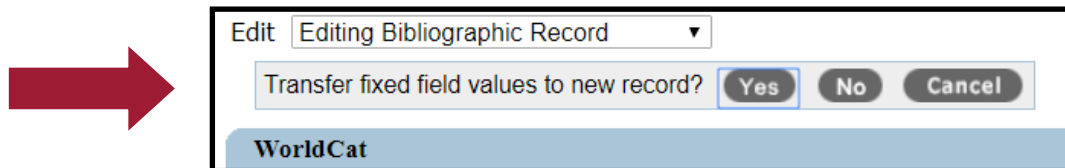
Jello (book) to My Own Cookbook (book)

5. After finding a good record, click the **Editing Bibliographic Record** dropdown.

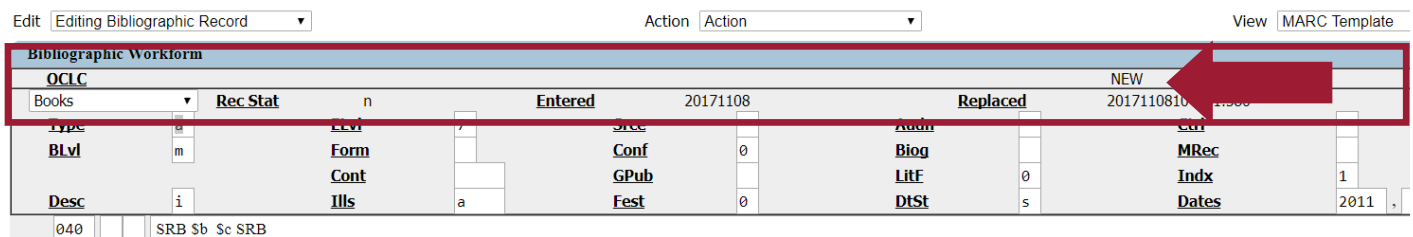
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6. Select **Derive New Master Record**.

7. Next, choose whether or not you want to transfer the fixed values to the new record.



8. You will know that you are working on a NEW record because there will not be an OCLC number and the word NEW will appear at the top of the page.



9. Edit the new record to match the title you have in hand.

10. Edit the 951 tag to reflect that you are creating the record for the consortium.

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11. **Validate** the record.

12. Click the Action dropdown and select **Save Record**. This will save your changes.

13. If you have completed editing the record, change the **Workflow Status** to **Completed**. If you still need to work on the record, set the status to **In-process**.

14. In the My Status box, enter your name.

15. Then, select **Yes** to save the record to the Save File.

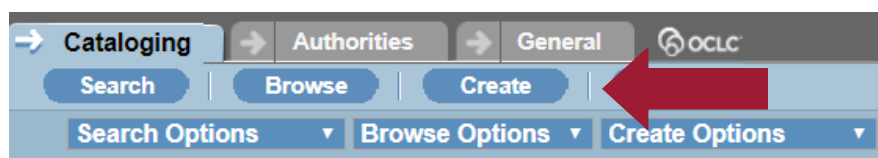
## Follow the steps below to Create a New Record from an OCLC template:

1. First, search Symphony WorkFlows for the title.

2. If you do not find a record in Workflows, login to OCLC Connexion.

3. Click Search. Make sure that you are searching the WorldCat catalog.

4. If you do not find a matching record and would like to create a new record, Click the **Create tab**.



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5. Leave the format as MARC Template and then select the workform that matches your item.
6. Click **Create**.

**Create**

**Record**

Create a new record in  format

Use the  workform

Apply default constant data

Using RDA Workforms

7. In the workform that opens, add and edit any fields as needed. Keep in mind the minimum required fields that comprise a "good" record across various formats.

- 0xx Correct fixed field information
- 007 Physical description (mostly sound and video recordings)
- 020 ISBN
- 024 UPC if available
- 041 Language code
- 100 Author
- 245 Title/statement of responsibility
- 250 Edition
- 3xx Publication statement
- 490 Series statement
- 546 Language note (sound and video recordings)
- 500 Summary (if possible)
- 650 At least one subject heading
- 700 Access points, attributes for people
- 951 \_\_ \$! OSD

8. \*\*Please note: You may want to save your record periodically as you edit. The Connexion software routinely expires your session after a certain period of inactivity (40 minutes) and does not save any unsaved work. Click the **Action** dropdown and choose **Save Record**.

SEO will then export the records and load them into the Symphony database.

# Using OCLC Connexion to Edit and Create Titles

## Follow the steps below to Apply Constant Data to an OCLC template:

1. Click the **Create tab**.
2. Leave the format as MARC Template and then select the workform that matches your item.
3. Click **Create**.
4. To apply Constant Data to your template, click the **Edit** dropdown. Select either Apply CD By Name or Apply CD From List.
5. Select the Constant Data that matches your item. The Constant Data will overlay your template.
6. To reduce tag duplication, click the **Edit** dropdown and choose **Reformat Record**.
7. Edit the record.
8. When you have completed editing the record, click the **Edit** dropdown and select **Validate**.
9. Select the Action dropdown and Save the record.

SEO will then export the records and load them into the Symphony database.