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

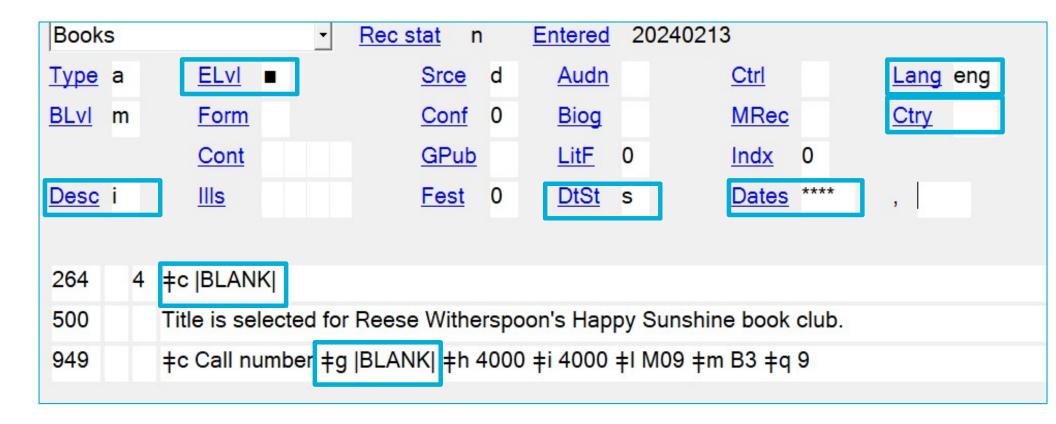
Fixed fields:

- 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

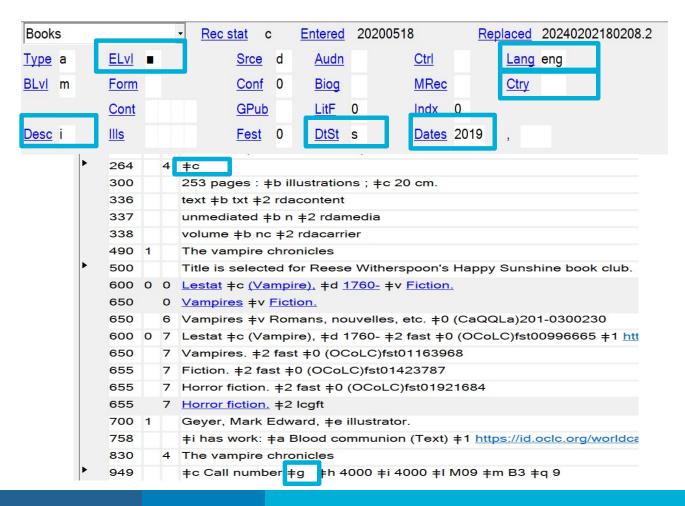
Variable fields:

- 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



Applied constant data with blanks/retention





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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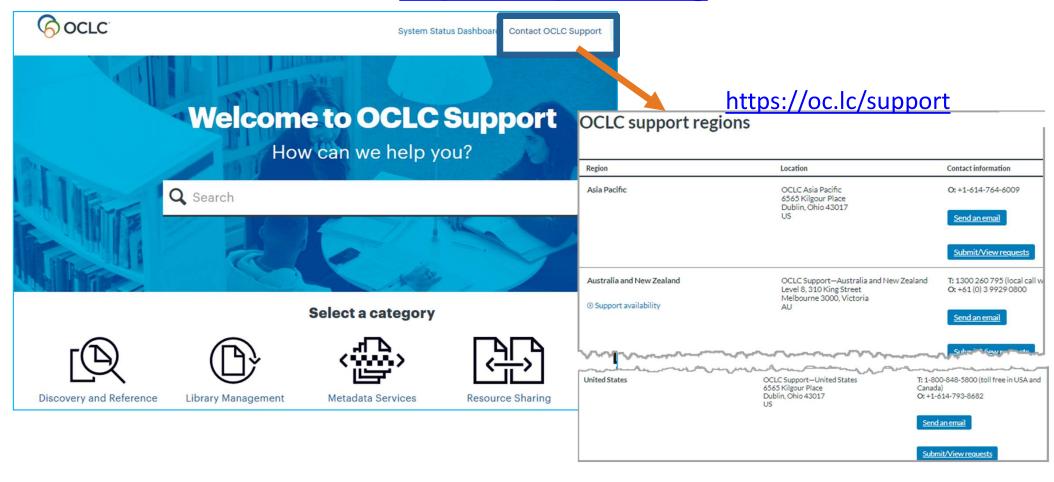
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Customization Tools

- 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





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/