Use Authority Constant Data

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Revision History

Date	Section title	Description of changes
May 2003	6. Find CD records	Updated to document new Retain Search option and Clear Search button.
October 2003	6. Find CD records	Added information about using the Search History function to view, revise, and reuse previous searches.
November 2003	All sections.	Updated to cover new and renamed constant data functions: Apply Default CD, Apply CD By Name, and Apply CD From List.
February 2004	5. Use CD search results	Noted that record-viewing buttons are hidden by default and provided keystroke (<Alt><Y>) to show the buttons.
July 2004	1. Overview; 2. Apply CD by Name or from list; 3. Create constant data; 4. Edit constant data; 5. Use default CD	Changed terminology to refer to constant data file (not CD database). Added information on procedure for retaining empty variable fields and/or subfields in CD records.
November 2004	1. AF CD overview	Revised to state that users can delete their default constant data record at any time.
November 2005	6. Find AF CD records	Added list of stopwords for searching the authority CD file.

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1 Authority constant data overview

Constant data for authority records

- **Authority constant data record.** A set of MARC fields that contains data your library uses for creating or editing authority records. Authority constant data records are stored in an authority constant data file shared by users at your library. Your authority constant data records are not available to users at other institutions.

  —You have two ways to apply any specific constant data record to an authority record you are editing.

  —**Apply CD By Name.** Type the name of the CD record you want to apply.

  —**Apply CD From List.** Select the CD record to apply from a list of your library's existing authority constant data records.

- **Default authority constant data.** One default authority constant data record is associated with each Connexion authorization during each session.

  —You can set any constant data record saved in the authority constant data file as your default authority constant data.

  —At any time, you can edit your default authority constant data or select another authority constant data record to set as your default CD.

  —When you take the **Apply Default CD** action, your default constant data is applied to the authority record you are editing.

  —You must have at least one constant data record in the constant data file, before the option Set as Default Constant Data is available.

  — **Shared authorizations.** All users of a shared authorization share **one** default constant data record. If one edits the default CD record associated with a shared authorization, or selects a different CD record as the default, the change is affects all other users of that authorization.

Authority constant data records and default authority constant data

Authority Constant data record	Default authority constant data
Resides in the authority constant data file for your library.	Authority constant data record associated with your authorization and with your current session. Resides in the authority constant data file for your library.
Stored in the authority constant data file until a user from your library deletes it.	Remains the default authority constant data for your authorization until you select another record as your default CD. Stored in the authority constant data file until a user from your library deletes it.

Authority Constant data record	Default authority constant data
Apply to an authority record In the record you are editing, • On the Edit list, click **Apply CD By Name** or press <Alt><K> and then <5>. Type the name of the CD record to apply and click **Apply CD**. Or • On the Edit list, click **Apply CD From List** or press <Alt><K> and then <6>. In the list, click the name of the CD record to apply.	**Apply to an authority record** In the record you are editing, on the Edit list click **Apply Default CD** or press <Alt><K> and then <C>. Or Apply to multiple records Retrieve a group of records from the authority save file. On the search results screen, flag the records. On the Action/Sort list, click **Apply Default CD to Flagged Records**.
To edit an authority constant data record Retrieve the record from the authority constant data file, edit the record, and then **save (replace)** the edited version in the authority constant data file. **To create a new constant data record** On the Authorities tab, under Create, click **Constant Data**. At the Create Authority Constant Data screen, select the constant data format and click **Create**. Enter the content you want in the authority constant data record, and then **save (add)** the new record to the authority constant data file.	**To edit default authority constant data** On the Authorities tab, under Show Options, click **Default CD**. Edit the default constant data. When finished revising, resave the record to **replace** it in the pathfinder CD file. Or Retrieve the default CD record from the authority constant data file, edit the record, and then **save (replace)** the edited version in the file. **To make another record your default CD record** Retrieve a record from the authority constant data file and take the **Set as Default Constant Data** action.
Shared with all users from your library.	Shared with all users from your library.
Editing changes the stored record when you **save (replace)** the previous version with the revised version. You **cannot** add an edited authority constant data record to the file with a new name to avoid replacing the original constant data record.	Changes to your default CD affect the authority constant data record stored in your library's authority constant data file.

Authority Constant data record	Default authority constant data
The **Apply CD By Name** action or the **Apply CD From List** action lets you choose which MARC fields (fixed field, variable fields, or both) to apply to an authority record.	The **Apply Default CD** action automatically applies the MARC fields designated when you last edited the default constant data record. To change which MARC fields are applied, you must edit the default constant data record **before** you take the **Apply Default CD** action.
Can be deleted. Retrieve an authority constant data record and take the **Delete Constant Data Record** action.	**Can be deleted by you or another user at your library.** If you take the **Apply Default CD** action after your default CD record has been deleted, or before you have designated a CD record as your default CD, the system displays an error message.

2 Apply authority constant data by name or from list

Two ways to apply a specific authority CD record

- **Apply CD By Name.** Type the name of the CD record you want to apply.

- **Apply CD From List.** Select the CD record to apply from a list of your library's existing constant data records.

- With either method, you can

  —Retrieve and apply any existing authority constant data record.

  —Apply an authority constant data record without first making it your default constant data.

  —Specify which MARC constant data fields to apply after selecting a CD record.

Apply authority constant data by name

	Action
1	- Retrieve an authority record or create a new record and begin editing. **Edit mode only.** You must be in edit mode to apply constant data.
2	- On the Edit list, click **Apply CD By Name** or press <Alt><K> and then <5> (or <Alt><J> and then <5>). An entry area opens above the record header.
3	(Optional) Specify which fields of the constant data record you want applied to the authority record. - Click to select the option button for **Whole Record** or **Variable Fields Only** or **Fixed Field Only**. - **Default setting:** Variable Fields Only.

	Action
4	1. In the **Specific CD Name** text box, type the name of the constant data record you want to apply. 2. Click **Apply CD** or press <Enter>. **Results** • **MARC constant data fields applied.** Depending on the option you selected, the system adds the entire record, the fixed field only, or the variable fields only. — **Fixed field:** Values of elements in the fixed field (008 and Leader) replace corresponding elements in the record, unless the constant data contains asterisks (*) in place of a value. Or select **Variable Fields Only** to preserve all fixed field values. — **Repeatable variable fields** in constant data are added to the bibliographic record. Repeatable fields in constant data **do not replace** corresponding variable fields in the record. Edit the resulting record to combine or delete unwanted repeated variable fields. — **Nonrepeatable variable fields** Nonrepeatable fields in constant data **replace** corresponding variable fields in the record. — **Empty variable fields:** To retain an **empty** variable field in constant data, In the constant data record, include the appropriate MARC tag and either type a few characters in the content area or type **$a |BLANK|** (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical ba). — **Subfields:** If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the record. To retain **empty** subfield codes in a variable field in constant data, type the following after each subfield code: **|BLANK|**. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field.
5	Make any other changes you wish to complete the record.
6	**Save the record for further processing and/or review.** • On the Action list, click **Save Record** to add the record to the authority save file. Assign a status appropriate for the record's position in your workflow. Or **Take a final action on the record.** • **New record.** On the Action list click **Add Record**. • **Existing record, local edit mode.** On the Action list, click **Export Record in MARC**. • **Locked WorldCat record (WorldCat edit mode).** On the Action list, click **Replace Record**.

**Apply authority
constant data from list**

	Action
1	• Retrieve an authority record or create a new record and begin editing. **Edit mode only.** You must be in edit mode to apply constant data.
2	• On the Edit list, click **Apply CD From List** or press <Alt><K> and then <6> (or <Alt><J> and then <6>). The Select Constant Data window appears, listing your authority constant data records. The list is sorted alphabetically by constant data name.
3	(Optional) In the Select Constant Data window, specify which fields of the constant data record you want applied to the authority record. • Click to select the option button for **Whole Record** or **Variable Fields Only** or **Fixed Field Only**. • **Default setting:** Variable Fields Only.

4	• In the list of constant data records, click the hyperlinked name of the constant data record you want to apply.
	 Results
	 • **MARC constant data fields applied.** Depending on the option you selected, the system adds the entire record, the fixed field only, or the variable fields only.
	   — **Fixed field:** Values of elements in the fixed field (008) replace corresponding elements in the record, unless the constant data contains asterisks (*) in place of a value. Or select **Variable Fields Only** to preserve all fixed field values.
	   — **Repeatable variable fields** in constant data are added to the authority record. Repeatable fields in constant data **do not replace** corresponding variable fields in the record. Edit the resulting record to combine or delete unwanted repeated variable fields.
	   — **Nonrepeatable fields** Nonrepeatable fields in constant data **replace** corresponding variable fields in the record.
	   — **Empty variable fields:** To retain an **empty** variable field in constant data, In the constant data record, include the appropriate MARC tag and either type a few characters in the content area or type **$a |BLANK|** (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical ba).
	   — **Subfields:** If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the authority record. To retain **empty** subfield codes in a variable field in constant data, type the following after each subfield code: **|BLANK|**. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field.

	Action
5	Make any other changes you wish to complete the record.
6	**Save the record for further processing and/or review.** • On the Action list, click **Save Record** to add the record to the authority save file. Assign a status appropriate for the record's position in your workflow. Or **Take a final action on the record.** • **New record.** On the Action list click **Add Record**. • **Existing record, local edit mode.** On the Action list, click **Export Record in MARC**. • **Locked WorldCat record (WorldCat edit mode).** On the Action list, click **Replace Record**.

3   Create authority constant data records

Why create authority constant data records?

- Avoid rekeying frequently used information.

- Reduce typing errors and improve consistency among related authority records.

- Add specific fields to multiple authority records.

- Develop and maintain standards for use in all authority records or for specific types of authority records.

About authority constant data records

- Users at the same institution (same OCLC symbol) share an authority constant data file that contains constant data records for use within Connexion.

- Your library's authority constant data records are not shared with users at any other institution.

- Any user at an institution can add authority constant data records to this file, edit existing authority constant data records, use a stored record as default constant data, or delete authority constant data records.

Create an authority constant data record from a workform

	Action
1	- On the Authorities tab, under Create Options, click **Constant Data**. The Create Authority Constant Data screen appears.
2	At the top of the screen, select the format to use for constant data. Open the list labeled **using the____format**. Then click the format in which you normally edit authority records (MARC or MARC Text Area).
3	Click **Create** or press <Enter>. The system displays a blank authority record in the edit view you specified.

	Action
4	Enter content you want to reuse in multiple authority records. • **Insert empty fields via constant data.** In the authority constant data record, include the appropriate tag and enter a few characters in the content area or type **$a |BLANK|** (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical ba). (Authority constant data does not retain fields that contain no data.) • **Retain empty subfields in variable fields.** If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain empty subfield codes in a variable field in constant data, type the following after each subfield code: **|BLANK|**. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field. • **Protect fixed field elements in records.** By default, the fixed field in authority constant data overwrites the fixed field in an authority record. You can prevent a specific element in the constant data fixed field from replacing that element in the fixed field of an authority record. In the authority constant data record, type asterisks (*) in the text box for the element. Type 1 asterisk for each character of the element value. For example, to preserve the value for the Rules element in authority records, type ***** in the **Rules** element of the authority constant data record.
5	Save the new authority constant data record. • On the Action list, click **Save Constant Data Record** or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
6	1. At the top of the screen, in the text box, enter a name for the authority constant data record. Use a name that indicates the content or purpose of the constant data. 2. **Set as default CD.** If desired, select the check box labeled **Make this your default constant data?**. 3. Then click **Yes** to add the new CD record to your institution's authority constant data file. **Results** • When you click **Yes**, the system adds the new authority constant data record and displays a confirmation message. • Then the system redisplays the authority constant data record as saved: empty fields are removed. • The constant data name you supplied appears at the top of the new authority constant data record.

Create authority constant data record from an authority record

	Action
1	Locate the record on which to base an authority constant data record. 1. Search the Authority File or the authority save file to retrieve a results list that contains the record you want. 2. Click the entry number to view the record in edit mode. Or Click the Display button to display the pathfinder.
2	1. On the Edit list click **Derive New Constant Data Record** or press <Alt><K> and then <4> (or <Alt><J> and then <4>). 2. Click **OK** to confirm that you want to create a new CD record. **Results** The system displays the content of the new authority constant data record.
3	Save the new authority constant data record. - On the Action list, click **Save Constant Data Record** or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
4	1. At the top of the screen, in the text box, enter a name for the authority constant data record. Use a name that indicates the content or purpose of the constant data. 2. **Set as default CD.** If desired, select the check box labeled **Make this your default constant data?**. 3. Then click **Yes** to add the new CD record to your institution's authority constant data file. **Results** - When you click **Yes**, the system adds the new authority constant data record and displays a confirmation message. - Then the system redisplays the authority constant data record as saved: empty fields are removed. - The constant data name you supplied appears at the top of the new authority constant data record.

Create authority constant data record from an existing authority CD record

	Action
1	Retrieve and view the authority constant data record on which to base a new authority constant data record.
2	1. On the Edit list click **Derive New Constant Data Record** or press <Alt><K> and then <4> (or <Alt><J> and then <4>). 2. Click **OK** to confirm that you want to create a new CD record. **Results** The system displays the content of the new authority constant data record.

	Action
3	Save the new authority constant data record. • On the Action list, click **Save Constant Data Record** or press <Alt><K> and then <S> (or <Alt><J> and then <S>).
4	1. At the top of the screen, in the text box, enter a name for the authority constant data record. Use a name that indicates the content or purpose of the constant data. 2. **Set as default CD.** If desired, select the check box labeled **Make this your default constant data?**. 3. Then click **Yes** to add the new CD record to your institution's authority constant data file. **Results** • When you click **Yes**, the system adds the new authority constant data record and displays a confirmation message. • Then the system redisplays the authority constant data record as saved: empty fields are removed. • The constant data name you supplied appears at the top of the new authority constant data record.

4   Edit authority constant data

**Edit default constant
data**

	Action
1	On the Authorities tab, under Show, click **Default CD**. Or Search authority constant data and select the default CD record from the results list.
2	Make the necessary changes to your default constant data. • **Insert empty fields via constant data.** In the authority constant data record, include the appropriate tag and enter a few characters in the content area or type **$a |BLANK|** (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical ba). (Authority constant data does not retain fields that contain no data.) • **Retain empty subfields in variable fields.** If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the bibliographic record. To retain empty subfield codes in a variable field in constant data, type the following after each subfield code: **|BLANK|**. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field. • **Protect fixed field elements in records.** By default, the fixed field in authority constant data overwrites the fixed field in an authority record. You can prevent a specific element in the constant data fixed field from replacing that element in the fixed field of an authority record. In the authority constant data record, type asterisks (*) in the text box for the element. Type 1 asterisk for each character of the element value. For example, to preserve the value for the Rules element in authority records, type * in the Rules element of the authority constant data record.

	Action
3	Specify fields to apply In the MARC or MARC Text Area edit view of default constant data, the **MARC Fields to Apply** option appears at the top of the screen. The setting for this option determines which fields of authority constant data are applied to an authority record when you take the **Apply Default Constant Data** action. Select **Whole record** or **Variable fields only** or **Fixed fields only**.
4	Replace the edited record in the authority constant data file. - On the Action list, click **Save Constant Data Record** or press <Alt><K> and then <S> (or <Alt><J> and then <S>). The system asks you to confirm that you want to replace the previous version of the record with the revised version. - Click **Yes** to replace the existing record with the edited record. - Or click **No** to cancel the action and resume editing. **Results** - The edited version **replaces** the previous version of the record and remains set as your default authority CD.

Edit authority constant data record

	Action
1	On the Authorities tab, under Search, click **Constant Data**. The Search Authorities Constant Data screen appears.
2	In the text box, type the name of the stored authority constant data record you want to edit. Or To retrieve a list of all records in your library's authority constant data file, leave the text box empty.
3	Click **Search** or press <Enter>. The system displays a full record or a list of retrieved records.
4	Single constant data record - On the Edit list, click **Edit Constant Data** or press <Alt><K> and then <L> (or <Alt><J> and then <L>). Constant data results list - Click the hyperlinked entry number next to the name of the authority constant data record you want to edit. The constant data record appears in an edit view.

	Action
5	Modify the authority constant data record as appropriate.
6	Replace the edited record in the authority constant data file. • On the Action list, click **Save Constant Data Record** or press <Alt><K> and then <S> (or <Alt><J> and then <S>). The system asks you to confirm that you want to replace the previous version of the record with the revised version. • Click **Yes** to replace the existing record with the edited record. • Or click **No** to cancel the action and resume editing. **Results** • The edited version **replaces** the previous version of the record. • The system does not let you preserve the previous version of the record. **Notes** • You cannot supply a new name for an edited constant data record and then add it to the file as a new record.

Authority constant data record editing restriction

- When you begin editing an authority constant data record retrieved from your library's authority constant data file, the record is locked. Other users at your library cannot edit the same record until you release the lock.

- The system unlocks the record when you replace the edited record in the authority constant data file or when you take the take the Cancel Changes action.

Exit warning for authority constant data records

- When you exit, the system checks for records currently in edit mode, including constant data records.

- If you have started editing an authority constant data record or created a new authority constant data record but have not added it to the CD file, the system displays a message reminding you to complete editing and replace or add the record(s) before exiting.

- To return to the record(s), on the Authorities tab, under Show, click **Active Records**. At the Active Records screen under Records in Authority Constant Data, click a constant data name or a new constant data record listed as **New**.

- To exit and discard unsaved changes to the record(s), on the message screen click **Exit anyway**.

Resume editing authority constant data

You can interrupt work on an authority constant data record (for example, to view other records or change display options) and then resume editing the record.

Action
On the Authorities tab under Show Options, click **Active Records** or press <Ctrl><Shift><9>. On the Active Records screen, under Records in Authorities Constant Data, click the hyperlinked **constant data name** of the authority constant data record you want to work with. Or click **New** (if editing a newly created authority constant data record).

5   Use default authority constant data

About default constant data

- One default authority constant data record is associated with each Connexion authorization during each session.

- You can set any constant data record saved in the authority constant data file as your default authority constant data.

- At any time, you can edit your default authority constant data or select another authority constant data record to set as your default CD.

- When you take the **Apply Default CD** action, your default constant data is applied to the authority record you are editing.

Authority constant data fields applied

- Set the **MARC Fields to Apply** option in your default constant data to specify which fields (fixed, variable, or all) you want applied. Edit your default constant data to set this option: the setting then determines which fields are added to an authority record. You **cannot** change the setting for each authority record when **applying** default constant data; you must set it in the default constant data **before** you apply default constant data to an authority record.

- Depending on the option you select, the system adds the entire record, the fixed field only, or the variable fields only.

  —**Fixed field:** Values of elements in the fixed field (008) replace corresponding elements in the record, unless the constant data contains asterisks (*) in place of a value. Or select **Variable Fields Only** to preserve all fixed field values.

  — **Repeatable variable fields** in constant data are added to the authority record. Repeatable fields in constant data **do not replace** corresponding variable fields in the record. Edit the resulting record to combine or delete unwanted repeated variable fields.

  —**Nonrepeatable fields** Nonrepeatable fields in constant data **replace** corresponding variable fields in the record.

  —**Empty variable fields:** To retain an **empty** variable field in constant data, In the constant data record, include the appropriate MARC tag and either type a few characters in the content area or type **$a |BLANK|** (delimiter character, a, space, a vertical bar character, the uppercase letters BLANK, and then another vertical ba).

  — **Subfields:** If variable fields in constant data include subfields that contain valid values, the subfields remain in the field added to the authority record.

To retain **empty** subfield codes in a variable field in constant data, type the following after each subfield code: **|BLANK|**. (Type a vertical bar character, the uppercase letters BLANK, and then another vertical bar.) When you apply the constant data, the subfield code (followed by a space) appears in the added variable field.

Apply default constant data to an authority record

	Action
1	Retrieve an authority record or create a new authority record and begin editing. **Edit mode only** You must be in edit mode (WorldCat edit or local edit) to apply default constant data.
2	• On the Edit list, click **Apply Default CD** or press <Alt><K> and then <C> (or <Alt><J> and then <C>). The system adds the default constant data. • **MARC constant data fields applied.** Depending on the option you select for **MARC Fields to Apply**, the system adds the entire record, the fixed field only, or the variable fields only. **Select constant data fields to apply** To change the setting, edit your default authority constant data. 1. On the Authorities tab, under Show Options, click **Default CD**. 2. Change the **MARC Fields to Apply** setting as you wish. 3. Save the constant data record.
3	Make any other changes you wish to complete the authority record.
4	**Save the record for further processing and/or review.** 1. On the Action list, click **Save Record** to add the record to the authority save file. 2. Assign a status appropriate for the record's position in your workflow. Or **Take a final action on the record.** • **New record.** On the Action list click **Add Record**. • **Existing record, local edit mode.** On the Action list, click **Export Record in MARC**. • **Locked WorldCat record (WorldCat edit mode).** On the Action list, click **Replace Record**.

Apply default constant data to multiple authority records

- **Saved records only.** The Apply Default CD to Flagged Records action is available only for records in the authority save file.

- **Maximum of 100 flagged records per action.** If you flag more than 100 authority records and then take the Apply Default CD action, Connexion applies default constant data to the first 100 flagged records. Then the system asks whether you want to process the remaining flagged records or cancel the action.

	Action
1	Search the authority save file to retrieve records to which you want to apply default constant data.
2	On the search results screen, flag the records. • Flag each record by selecting the check box to the left of the brief entry. Or • On the Action/Sort list, click **Flag All on Page** or **Flag All Records Retrieved**.
3	**Optional: Combine records flagged in separate search results** To apply default CD to records retrieved and flagged in separate searches, use the Flagged SF Records screen. 1. Retrieve and flag groups of saved authority records. 2. On the Authorities tab, under Show Options, click **Flagged SF Records**. 3. On the Action/Sort list, click **Flag All on Page** or **Flag All Records Retrieved**.
4	On the Action/Sort list, click **Apply Default CD to Flagged Records**. • The system adds the default constant data to all flagged records. • **MARC constant data fields applied.** Depending on the option you select for **MARC Fields to Apply**, the system adds the entire record, the fixed field only, or the variable fields only. **More than 100 flagged records.** If you flag more than 100 records and then take the Apply Default CD action, Connexion applies default constant data to the first 100 flagged records. Then the system asks whether you want to process the remaining flagged records or cancel the action. • Click **Continue** to apply default CD to the next 100 flagged records. Or • Click **Cancel** to stop processing flagged records.
5	Edit each record to make other changes needed to complete the content.

Set an authority constant data record as default constant data

	Action
1	On the Authorities tab, under Search Options, click **Constant Data**.

2	At the Search Authority Constant Data screen,
	• In the text box, type the name of the stored authority constant data record you want to retrieve.
	  Type one or more words of the constant data name.
	  Or
	• To retrieve a list of all your authority constant data records, in the search form, leave the text box empty.

	Action
3	Click **Search** or press <Enter>. The system displays the authority constant data record(s) that match the query.
4	**Single authority constant data record** • On the Edit list, click **Set as Default Constant Data** or press <Alt><K> and then <G> (or <Alt><J> and then <G>). **Authority constant data results list** • Click the **Set Default** button next to the name of the authority constant data record you want to become your default constant data. The selected default constant data record appears in edit mode.

Include default constant data in new authority record

When you create an authority record from a workform, you can automatically add your default constant data to the record.

	Action
1	On the Authorities tab, under Create Options, click **Authorities**.
2	At the Create Record screen, 1. Select the format (editing view) you prefer: **MARC Template** or **MARC Text Area** 2. Select the workform for the type of record you want to create.

3	**Include default constant data.**
	• To merge content from your default constant data into the selected workform select the check box labeled **Include Default Constant Data**.
	Default setting: check box not selected; the system does not add default constant data.
	Select constant data fields to apply
	• Depending on the option you select for **MARC Fields to Apply**, the system adds the entire record, the fixed field only, or the variable fields only.
	• To change the setting, edit your default authority constant data.
	   a. On the Authorities tab, under Show Options, click **Default CD**.
	   b. Change the **MARC Fields to Apply** setting as you wish.
	   c. Save the constant data record.

4	Click **Create** or press <Enter>. **Result** • The system retrieves the selected workform and merges your default constant data. The resulting authority record appears in the editing view you selected (MARC or MARC Text Area). • Fields in the new record contain default values from the workform and/or content from default constant data.
5	Edit the new record to create a complete and accurate authority record.
6	**Add the record to the Authority File** • On the Action list, click **Add Record**. Or **Save the record for later review and completion** • On the Action list, click **Save Record**.

6 Find authority constant data records

Why search for authority constant data records?

- Retrieve an authority constant data record to use as your default constant data.

- Review authority constant data records created by users at your library.

- Find an authority constant data record you want to edit.

- Find an authority constant data record you want to delete.

Find specific authority constant data records

	Action
1	On the Authorities tab, under Search Options, click **Constant Data**. The Search Authorities Constant Data screen appears.
2	In the text box, type the name of the stored authority constant data record you want to retrieve. Type one or more word(s) of the constant data name. - Use **truncation** to include variant endings for a constant data name. Or use truncation when you know only the first part of the name. Type the first characters of the name (include at least 2 characters); then type an asterisk (*). **Examples: conf***, **naco*** - Use character masking (wildcards) to expand a term to include variant spellings or when you are unsure of the correct spelling for part of a term. Type a question mark (?) or a number sign (#) in place of the character(s) you want to mask. Use the question mark to retrieve variants of 0 or more characters. **Example: int?net** retrieves `internet` or `intranet`. Use the number sign to retrieve variants of exactly 1 character. **Example: wom#n** retrieves both `woman` and `women`. To retrieve a single record, include the complete name.
3	Check the search form for errors. **Clear search** - To clear the **Search for** text box, click **Clear Search**. - The index list retains the last index you selected. - The **Retain Search** check box retains its setting (selected or cleared).
4	Click **Search** or press <Enter>. The system displays the authority constant data record(s) that match the query. **Retain search** - To preserve search terms you typed in the text boxes, select the **Retain Search** check box. - If **Retain Search** is not selected (the **default setting**), the system clears the **Search for** text box.

Stopwords

Omit the following words from a constant data search. If you include them, the system removes them before processing the query. If a query contains only stopwords, no records are retrieved.

Stopword list: a an and are as at be by for from in is of on or that the to with http www

List all your library's authority constant data records

	Action
1	On the Authorities tab, under Search Options, click **Constant Data**. The Search Authorities Constant Data screen appears.
2	In the search form, leave the text box empty.
3	Click **Search** or press <Enter>. The system displays a list of your library's authority constant data records.

Search history: view and use previous searches

- Use the Search History window to

—View your previous 10 constant data searches.

—Repeat a previous search.

—Revise a previous search.

- Previous searches are associated with your authorization number and are retained between Connexion sessions. The search history is not cleared when you log off.

Search History function	How to use
Open Search History window	At the Search Authorities Constant Data screen, - Click **Search History** or press <Alt><=>.
List of previous searches	For each listed search, the window shows - Search type: Authorities Constant Data. - Timestamp: date and time the search was performed. - Search criteria: terms searched in the Name index.
Repeat a previous search	- Click **Repeat**. Connexion immediately performs the selected search.
Revise a previous search	- Click **Revise**. Results - Connexion displays the Search Authorities Constant Data screen. The selected search is ready for revision.
Clear search history	- Click **Clear History** (at the top of the Search History window).
Close the Search History window	- Click **Close** (at the top of the Search History window).

7 Use authority constant data search results

Results display

Number of Records Found	Results Display

No records found	The system displays the following message at the top of the Search Authorities Constant Data screen:
	`No Records Found for your Search`
	`Please change or simplify your search and try again.`
	The search entry form retains the search term(s) you used.

1 record found	The system displays the full authority constant data record.

Up to 10 records	The system displays the message:
	`[number] records found searching for`
	`[search query] in Constant Data`
	• The results screen lists the constant data names of all retrieved records.
	• Records most recently added appear first.

11 or more records	The system displays the message:
	`[number] records found searching for`
	`[search query] in Constant Data`
	• The results screen lists constant data names for the first 10 retrieved records.
	• The **View List** box lets you type an entry number to display 10 entries beginning with that number. The left and right arrow buttons let you move forward or back 10 entries. The **View Record** box lets you type an entry number to view the full record.
	• Records most recently added appear first.

Query display At the top of the first screen of results, the system displays a message that includes the number of records retrieved and the query that produced the results. The message provides feedback that lets you see how the system interpreted your search criteria.The display shows:

- Your institution symbol as the first term in any query. Constant data file searches retrieve records for your library **only**. **Example:** `in: (OCL)`

- The word(s) of the constant data name you typed in the search form, preceded by the index label (nm:) for the constant data name index. **Example:** `in: (OCL) and nm: ("test")`

Use this displayed query to

- Diagnose causes for unsatisfactory search results.

- Refine your search to improve results.

Check name of default constant data record

Action
At the top of each screen of search results, the system displays the label **Default Constant Data Record**, followed by the constant data name of the record currently set as your default constant data.

Sort authority constant data results (500 or fewer records)

	Action
1	Scroll to the top of the first screen of search results.
2	On the Action/Sort list, click **Sort by Constant Data Name**.

Move through list (View List and View Record jump bar)

- The **View List** jump bar appears at the top and bottom of each screen of the results list.

- The **View Record** jump bar appears at the top and bottom of each screen of the results list.

Action	How to
Move forward 10 entries	Click the **right arrow button** (right of **View List** box).
Move back 10 entries	Click the **left arrow button** (left of **View List** box).
View 10 entries beginning with specific entry	Type an entry number in the **View List** box and press <Enter>.
View a specific record	Click the hyperlinked entry number for the record you want to view. Or Type an entry number in the **View Record** box and press <Enter>.

Move between records (View Record jump bar)

- The **View Record** jump bar appears at the top and bottom of each record screen.

- The record position indicator (**Record _ of _)** appears at the top and bottom of each record screen. As you move through the records, the indicator changes to reflect your current position in the results list.

Action	How to
View next record in list	Click the **right arrow button** (right of **View Record** box).
View previous record in list	Click the **left arrow button** (left of **View Record** box).
View a specific record	Type an entry number in the **View Record** box and press <Enter>.

Action	How to
Return to search results	Click the **Search Results** button at the top or bottom of the record screen. Or On the Authorities tab, under Search Options, Constant Data, click **Search Results**.

View or edit CD record from brief list

Action
View record in edit mode. - Click the hyperlinked entry number of the constant data record you want to edit.   Or - Type an entry number in the **View Record** box and press <Enter>. **View record in display mode.** Click the **Display** button in front of the entry for the record you want to view.

Show or hide record viewing buttons

- Record viewing buttons are hidden by default. Press <Alt><Y> to show the buttons to the left of each entry.

- Click the **Display** button to view a record in display mode (read-only).

Action
Press <Alt><Y> to insert a **Display** button to the left of each brief entry. To hide the buttons, press <Alt><Y> again.

Delete authority constant data record

	Action
1	On the results screen, click the entry number or click the **Display** button for the constant data record you want to delete.
2	On the Action list, click **Delete Constant Data Record** or press <Alt><K> and then <X> (or <Alt><J> and then <X>). - Click **OK** to confirm that you want to delete the record. Or - Click **Cancel** to keep the record in the constant data file.

Use authority constant data record as default constant data

Action
- Click the **Set Default** button in front of the constant data record you want to use as default authority constant data. The full record appears in a display view. The following message appears at the top of the record display: `Record set as your default constant data.`

**Print screens of
authority constant
data results list**

	Action
1	If the list includes multiple screens, jump to the screen you want to print.
2	Click once in the frame that contains the record list.
3	In your browser, on the File menu, click **Print** or on the toolbar click the **Print** button.
4	In the Print dialog box, click **OK** or press <Enter>.