

## Requirements, Access, Interface Map

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## Revision History

Date	Section title	Description of changes
August 2006	1. Hardware and software; 2. Log on, log off, automatic logon; 6. Help and tech support; 7. News	Minor updates and corrections.
January 2007	1. Hardware and software re	Updated browser requirements and added details on using Internet Explorer 7 with Connexion browser.
April 2007	3. Accessibility features	Added new section describing accessibility features of Connexion browser. Renumbered subsequent sections.
May 2007	4. Active Records	Added information about display of institution records attached to master bibliographic records.
February 2012	6. Overview of services and actions	In the Dewey Services tab, if you select <b>WebDewey</b> (full Dewey), the service opens in an independent, standalone session, separate from the Connexion browser session. Abridged WebDewey is in the process of becoming part of the standalone Dewey service also; until then, access is through the Dewey tab in the Connexion browser.

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## 1 Browser support and recommended settings

### Notes to CatExpress users

OCLC Connexion browser is the cataloging system of which CatExpress is a part. CatExpress operates within the Connexion environment, so you use Connexion to access and use CatExpress. Requirements and recommendations for Connexion apply also to CatExpress.

However, examples of possible problems may mention advanced cataloging functions of Connexion that are not available to CatExpress subscribers.

### Browser support

Browser	Recommended	Notes
Internet Explorer MSN Explorer	Version 6.0 through 8.0	MSN Explorer is based on Internet Explorer and should work with all system functions. <b>Note to Macintosh users:</b> IE 5.2 running under the OS X operating system has serious flaws that prevent many Connexion functions from working properly. Under earlier versions of the Macintosh OS, IE 5.1 or 5.0 may work adequately with Connexion.*
Firefox	Most recent release of version 3.0.x	Version 3.0.6 or later is strongly recommended due to improved performance and security. Earlier versions work with most Connexion functions but are not preferred. Firefox is based on Mozilla's Gecko layout engine. Its functionality is similar, but not identical, to that of the Mozilla browser.
		<b>*Macintosh users:</b> OCLC does not systematically test Connexion with Macintosh hardware, operating systems or browsers. Advice to Macintosh users is based on limited testing and user reports.

### Connexion browser and Internet Explorer 7 and 8

Users have requested information regarding Connexion's compatibility with Internet Explorer 7 and 8 (IE7 and IE8). OCLC supports Internet Explorer 7 or 8 for use with Connexion browser. Issues are addressed through application changes or suggested workarounds.

for details on problems and workarounds, visit

<http://www.oclc.org/connexion/support/connexionIE7andIE8.docx>

### Unsupported browsers

The following browsers are not supported for use with the OCLC cataloging system:

- Apple® Safari for Macintosh or Safari for Windows

- Google® Chrome
- Opera
- AOL (America Online)
- Lynx

### Browser navigation buttons

Browser button	Notes
Back Forward	<b>Do not use.</b> <ul style="list-style-type: none"><li>• Move among system screens using <b>only</b> the tabs, buttons, keystroke shortcuts, and other navigation features provided in the Connexion interface.</li></ul>
Stop	<b>Do not use.</b> <ul style="list-style-type: none"><li>• The browser's Stop button cannot cancel actions because, in most cases, the action is sent immediately to the server. The use of the stop button can also cause display problems.</li></ul>

### Cache settings for best performance

#### About cache settings

- Browser cache settings determine how your browser handles redisplaying Web pages you have previously viewed.
- The browser may display the page as it exists in temporary storage (the browser's cache area) or download the latest version of the page from the server.
- Using the recommended settings can improve browser performance by instructing the browser to display stored pages, rather than downloading fresh pages from the server, when revisiting a site.
- **Note:** Your browser may already be configured to the recommended settings. Many of these settings are defaults.

#### Recommended settings

- Set your browser to refresh Web pages **automatically** when necessary. Do **not** specify that the browser refresh a page each time you view it.
- Allocate adequate disk space for the browser cache. 10 MB is recommended. Do **not** specify zero space for the cache, and avoid allowing it to be larger than 50 MB.
- Do **not** configure Internet Explorer to clear the cache each time you exit the browser.
- Retain the browser's History (log of recently visited sites) for 4 days.

#### Notes on cache size

- By default, recent versions of Internet Explorer assign a very large value for cache size. In some cases it may be 200 MB or higher. Unless you regularly download many large video or Flash files, we recommend that you reduce the

value for 'Amount of disk space to use' to 10 MB. This is more than sufficient for most users and greatly reduces browser overhead for maintaining the cache.

- Firefox defaults to between 5 and 50 MB of cache. You can accept their defaults unless you experience performance problems. To improve performance, it may help to change the cache size to 10 MB. A cache that is too large often causes just as many problems as one that is too small.

### Before changing browser settings

- The recommended settings may not work with certain network security configurations or with some web-based applications.
- If you experience problems with Connexion browser or with other web-based applications when using the recommended cache settings, see the section titled *Resolve caching problems* (later in this topic).
- Before changing cache/history settings, write down your current settings so that you can restore them if the new settings cause problems.

Browser	Setup instructions
Internet Explorer	<ol style="list-style-type: none"><li>1. On the Tools menu click <b>Internet Options</b>.</li><li>2. On the General tab, under Temporary Internet Files, click the <b>Settings</b> button.</li><li>3. In the Settings dialog box, under Check for newer versions of stored pages, click <b>Automatically</b>.</li><li>4. Under Amount of disk space to use, type <b>10</b> in the text box.</li><li>5. Then click <b>OK</b> to close the Settings dialog box.</li><li>6. On the General tab, under History, for Days to keep pages in history, type <b>4</b> in the text box.</li><li>7. On the Advanced tab, under Security (the last group of settings in the list), clear the check box labeled <b>Empty Temporary Internet Files folder when browser is closed</b>.</li><li>8. Click <b>OK</b> to close the Internet Options dialog box.</li></ol>

Browser	Setup instructions
Firefox	<ol style="list-style-type: none"> <li>1. On the Tools menu, click <b>Options</b>.</li> <li>2. In the Options dialog box, click <b>Privacy</b>.</li> <li>3. On the Privacy tab, in the History section, make sure the check box for <b>Remember visited pages for the last ___ days</b> is selected. To specify the number of days, type <b>4</b> in the text box.</li> <li>4. On the Privacy tab, in the Private Data section, make sure that the check box for <b>Always clear my private data when I close Firefox is cleared</b> (no check mark).</li> <li>5. Click <b>OK</b> to apply the change and close the Options dialog box.</li> </ol> <p>To specify how frequently the cache is refreshed:</p> <ol style="list-style-type: none"> <li>1. In Firefox, clear the URL shown in the address bar. Then type <b>about:config</b> and press &lt;Enter&gt;.</li> <li>2. In the Filter box, type <b>cache</b> to view the settings for cache-related preferences.</li> <li>3. For the first item listed, browser.cache.check_doc_frequency, keep the default setting, with the number <b>3</b> in the Value column. <b>Note:</b> This setting parallels the <b>Automatically</b> setting recommended for Internet Explorer.</li> </ol> <p><b>Caution:</b> When using the <b>about:config</b> settings, be careful <b>not</b> to accidentally change one of the many other settings on the list. Firefox saves changes automatically when you go to another web page.</p>

**Clear browser cache**

**Note: JavaScript errors after a Connexion release**

- If you experience JavaScript errors immediately after a Connexion release, try refreshing affected pages first, or clear your cache once rather than changing your settings.
- For best browser performance, do not clear the cache more often than necessary.
- But to resolve problems immediately after an install, clearing the cache once may be helpful.
- If clearing the cache does not solve a persistent caching problem, see the section titled *Resolve caching problems* (later in this topic). Symptoms of caching problems include: old data repeatedly appearing; check boxes not remaining selected; and changes not being retained.

	Action
1	Close all browser windows, including popups. This step is <b>essential</b> for the cache to be cleared completely.
2	Start just one browser window and navigate to a non-OCLC site such as Google or Yahoo. <b>Do not</b> start any other browser windows until <b>after</b> you complete the cache-clearing process.

	Action
3	Clear the cache. <b>Internet Explorer:</b> <ol style="list-style-type: none"> <li>1. On the Tools menu click <b>Internet Options</b>.</li> <li>2. On the General tab, under Browsing history, click the <b>Delete</b> button. In the Delete Browsing History dialog box, under Temporary Internet Files, click the <b>Delete Files</b> button. Then click <b>OK</b>.</li> <li>3. Click <b>OK</b> to close the options dialog box.</li> </ol> <b>Firefox:</b> <ol style="list-style-type: none"> <li>1. On the Tools menu click <b>Options</b>.</li> <li>2. Click <b>Privacy</b>.</li> <li>3. In the Private Data section, click the <b>Clear Now</b> button.</li> <li>4. In the Clear Private Data dialog box, make sure <b>Cache</b> is selected. Select or clear the other check boxes as appropriate.</li> <li>5. Click the <b>Clear Private Data Now</b> button.</li> <li>6. Then click <b>OK</b> to apply the change and close the dialog box.</li> </ol>
4	Close, and then restart, the browser. Log on to Connexion browser.

**Resolve caching problems**

- If, after using previously recommended cache settings and occasionally clearing the cache, you observe caching problems, you may need to change cache settings to correct the problem.
- **Suggested changes.** This section recommends that you set your browser to refresh pages every time you visit a page. Using the settings given in this section slows performance but can improve reliability when a workstation has a cache problem that causes the browser to display expired pages or incorrect data.
- These settings should be compatible with other web-based applications, including the following OCLC services: FirstSearch, and QuestionPoint.
- **Before changing cache settings.** Before changing cache settings, write down your current settings so that you can restore them if the new settings cause problems.

Browser	Setup instructions
Internet Explorer	<ol style="list-style-type: none"> <li>1. On the Tools menu click <b>Internet Options</b>.</li> <li>2. On the General tab, under Temporary Internet Files, click the <b>Settings</b> button.</li> <li>3. In the Settings dialog box, under Check for newer versions of stored pages, click <b>Every visit to the page</b>.</li> <li>4. Then click <b>OK</b> to close the Settings dialog box.</li> <li>5. On the General tab, under Temporary Internet Files, click the <b>Delete Files</b> button. In the Delete Files dialog box, select the <b>Delete All Offline Content</b> button. Then click <b>OK</b>.</li> <li>6. On the Advanced tab, under Security (the last group of settings in the list), select the check box labeled <b>Empty Temporary Internet Files folder when browser is closed</b>.</li> <li>7. Click <b>OK</b> to close the Internet Options dialog box.</li> </ol>

Browser	Setup instructions
Firefox	<p>To refresh the cache each time you visit a page:</p> <ol style="list-style-type: none"> <li>1. With Firefox open, clear text in the address bar. Then type <b>about:config</b> and press &lt;Enter&gt;.</li> <li>2. In the Filter box, type <b>cache</b>.</li> <li>3. Change the <b>browser.cache.check.doc.frequency</b> setting value to <b>1</b>. <b>Note:</b> This setting corresponds to the <b>Every visit to the page</b> setting in Internet Explorer.</li> <li>4. To apply the change, close Firefox. Or go to another web address by clicking the <b>Home</b> button or typing a URL in the address bar.</li> </ol> <p>To clear the cache (and/or other data) when you close Firefox:</p> <ol style="list-style-type: none"> <li>1. On the Tools menu, click <b>Options</b>.</li> <li>2. In the Options dialog box, click <b>Privacy</b>.</li> <li>3. On the Privacy tab, in the Private Data section, select the check box for <b>Always clear my private data when I close Firefox</b>.</li> <li>4. In the Private Data section, click the <b>Clear Now</b> button.</li> <li>5. In the Clear Private Data dialog box, make sure <b>Cache</b> is selected. Select or clear the other check boxes as appropriate. <b>All selected types of data</b> will be cleared when you close Firefox.</li> <li>6. Then click <b>OK</b> to apply the change and close the dialog box.</li> <li>7. Click <b>OK</b> to apply the change and close the Options dialog box.</li> </ol>

**Cookie options**

**About cookies**

- A **cookie** is a message a web server sends to your browser. Usually, cookies store information the server uses to manage the session. When you close your browser, cookies that remain in memory are saved to a file on your hard disk. Internet Explorer saves individual text (\*.txt) files in a **cookies** folder (locations vary with browser version and Windows version).
- Connexion browser uses cookies to update the session timer and keep track of your current screen. Because they are constantly recycled, cookies occupy negligible space in memory or on your hard disk.
- The timer function sends a cookie for each tick of the timer; each new cookie replaces the previous one. Each screen includes a small cookie in the HTTP header, but again the cookie overwrites the one sent with the previous screen.
- **Security/privacy.** Cookies are not required to use this system. However, some useful optional features will not work correctly if you set your browser to reject cookies. Specifically, the session countdown timer and the session timeout warning may report incorrect times. Also, without allowing cookies, you cannot save your authorization and password to avoid entering these items each time you log on. Cookies used by this system pose very little security risk because, other than the optional authorization and password (which are encrypted), no other user information is captured.

**Recommended settings**

- When first installed, both Internet Explorer and Firefox browsers are set to accept all cookies.
- For best results when using Connexion, leave this setting unchanged.

**Check your cookie settings**

Browser	To check cookie settings
Microsoft Internet Explorer	On the Tools menu click <b>Internet Options</b> . In the Internet Options dialog box, click the <b>Privacy</b> tab. Adjust the setting to <b>Medium</b> or <b>Medium High</b> . Click <b>OK</b> to close the Internet Options dialog box.
Firefox	On the Tools menu click <b>Options</b> . In the Options dialog box, click <b>Privacy</b> . In the Cookies section, make sure that <b>Accept cookies from sites</b> is selected (checked). If not, click the box to select the option. Click <b>OK</b> to close the Options dialog box. <b>Note:</b> Connexion does not use third-party cookies. You can clear the box for <b>Accept third-party cookies</b> if you do not visit sites that require them.

**Popup blocking software**

- Software that blocks the display of popup advertisements from Web sites can interfere with Connexion functions that open separate browser windows. Examples: label displays, the list of keystrokes, authority control, and Help.
- For best results while using Connexion, turn off popup blocking software.
- If you prefer to keep a popup blocker active, configure the software to allow popup windows from the domain **oclc.org**.

If you experience problems with Connexion functions **after** configuring **oclc.org** as an exception, contact the vendor of your popup blocker for information on known problems that might affect its operation.

**Note:** Popup blocking may be enabled on your workstation even if you have not installed a separate program for that purpose. Recent versions of browsers, security software, and other applications may include a popup-blocking tool or option. Add-on browser toolbars from search engines and portal sites, including the Google Search toolbar and the Yahoo Search toolbar, may also come with default popup blockers that need to be disabled. Before logging on to Connexion browser, verify that you have turned off all popup-blocking functionality on your workstation, or configured blocking to allow popups from the **oclc.org** domain.

**Download accelerator software**

- Software used to enable faster downloading of files through a Web browser can interfere with Connexion browser functions that involve downloading data to a file on your workstation.
- For best results, before exporting records to a file or creating labels for bibliographic records, turn off any download accelerator software you have installed.

### Delayed response: do not repeat action

- Do not click again on a button or link, or repeat a shortcut keystroke, while the system is still processing an action.
- Repeating an action while the system is processing your first request actually slows completion of the requested action. The second click or keypress cancels the initial request; processing starts over from the beginning.
- The system may not respond immediately when you start a search, switch record views, or take action on a record. The specific action requested, the number of other users interacting with the server, and the speed of your Internet connection are among the factors that determine response time.
- **WorldCat interactions.** When your request results in a WorldCat interaction, the system ignores any repeated requests until you reload the page. This prevents added transaction charges and slowed responses that may occur if the system sends repeated commands. **Note:** Using the browser's **Stop** button while waiting for a WorldCat response may prevent the system from reactivating the requested function.

### Unicode fonts recommended

- For best results when viewing and editing records and pathfinders, and when viewing web-based resources, specify a **Unicode font** in your browser (font settings are found in Options or Preferences). Using a Unicode font lets you take full advantage of the system's adoption of the Unicode standard for character encoding.
- For an extensive set of diacritics and special characters, OCLC recommends that you have the **Arial Unicode Microsoft** font (Arial Unicode MS) installed on your workstation and specified in your browser. Microsoft provides the font with many applications, including Microsoft Office, FrontPage, and Publisher.

**Note:** The Arial Unicode MS font is **not** installed by default with these Microsoft applications. For installation instructions, start a Microsoft application such as Word, open Help, and search Help for **unicode** or **Arial Unicode MS**.

- The **Lucida Sans Unicode** font, provided with Microsoft Windows XP and Windows Vista, has a less-complete character set but may meet your needs.
- The system currently enables display and editing of the ALA character set for bibliographic and authority records. For pathfinders, the system supports entry and display of all Unicode characters, including characters from non-Roman scripts. Future releases will expand support for non-Roman scripts.
- The system uses the UTF-8 character format to communicate with Web browsers and as its internal storage format. UTF-8 is a compact encoding of Unicode, a widely adopted standard that supports the communication of a large array of characters from the world's chief languages and scripts.
- **More?** Search Help for the keyword **diacritics** or **Unicode**.

### Show Connexion icon in Favorites (bookmarks)

- When you add the URL for the Connexion logon screen to the Favorites (bookmarks) list in your browser, the new Favorites item includes a Connexion icon.
- In Internet Explorer, the Connexion icon may not appear if you previously added the logon screen URL to your Favorites or to the browser's Links bar.

- To show the icon in the IE Favorites and/or Links bar, follow these steps.  
**Note:** Display of icons in Firefox bookmarks may work differently.

	Action
1	In Internet Explorer, delete all existing shortcuts to FRQQH[LRQ RFOF RUJ. this includes items in Favorites and items on the Links bar.
2	Clear the browser cache.
3	Close all browser windows.
4	Start Internet Explorer and go to <b>http://connexion.oclc.org</b> .
5	At the Connexion logon screen, add the URL to the Favorites list. After the item appears with the Connexion icon in Favorites, you can copy the item and paste it on the Links bar or to the desktop.

## 2 Log on, log off, and set up automatic logon

URL for access to OCLC Connexion

Access Type	URL
General Access	http://connexion.oclc.org

- Log on (start session)
- **Automatic logon.** For faster logon, set up a default authorization and password.
  - **Cataloging session or Dewey-Only session.**

	Action
1	Point your browser to the appropriate Connexion URL (see table). <b>Result</b> <ul style="list-style-type: none"> <li>• Connexion displays the logon screen for a cataloging services session.</li> <li>• Or</li> <li>• If your default authorization is designated Dewey-Only, Connexion displays the Dewey Services-only logon screen.</li> </ul>
2	Enter authorization and password: <ul style="list-style-type: none"> <li>• <b>Default authorization and password.</b> Use the displayed authorization. Type the password if not already supplied.</li> <li>• <b>Multiple saved authorizations.</b> Select a saved authorization from the list. Type the password if not already supplied.</li> <li>• Type an authorization number and password.</li> </ul>
3	Click <b>Logon</b> or <b>Logon to Dewey-Only Session</b> or press <Enter>.

About the Related Links

### Note: Top link toggle

- The first link in the Related Links area can be labeled **Dewey-Only Session** or **Cataloging Session**. When you click the link, the label toggles to show the alternative text.
- The logon button also toggles when you click the first link. When you click the **Dewey-Only Session** link, the button changes to **Logon to Dewey-Only Session**. When you click the **Cataloging Session** link, the button changes to **Logon**.
- **Default setting.** Connexion displays a logon screen for a cataloging session: the button label is **Logon** and the first link is **Dewey-Only Session**.

To display a Dewey-Only logon screen by default, designate your default authorization as Dewey-Only.

Link	Description
Dewey-Only Session <b>Shortcut Key</b> <Ctrl><Shift><1>	Top link in the Related Links area of logon screen for a Connexion cataloging session. <ul style="list-style-type: none"> <li>Click to switch to a logon screen for a Dewey Services Only session (access only to the Dewey services to which you subscribe).</li> </ul> <p><b>Authorization.</b> To start a Dewey-Only session, you need one of the following:</p> <ul style="list-style-type: none"> <li>An OCLC Cataloging service authorization that includes a subscription to WebDewey and/or Abridged WebDewey.</li> <li>An authorization for Dewey Services only (no access to OCLC Cataloging services).</li> </ul> <p><b>Why use?</b> Dewey-Only sessions provide access to WebDewey and/or Abridged WebDewey and</p> <ul style="list-style-type: none"> <li>Do not incur access and user support fees</li> <li>Do not count against simultaneous logon limits for libraries subscribing to flat fee Internet access</li> <li>Include a default inactivity timeout of 120 minutes (default timeout for other Connexion sessions is 40 minutes)</li> </ul>
Cataloging Session <b>Shortcut Key</b> <Ctrl><Shift><1>	Top link in Related Links area of logon screen for a Dewey-Only session. <ul style="list-style-type: none"> <li>Click to switch to a logon screen for a Connexion cataloging session (access to all Connexion services for which you are authorized).</li> </ul> <p><b>Authorization.</b> To start a cataloging session, you need an OCLC cataloging services authorization number and password.</p>
Connexion Documentation <b>Shortcut Key</b> <Ctrl><Shift><2>	Link to a page on the OCLC web site that lists all Connexion-specific documentation and related resources.
Connexion Tutorials <b>Shortcut Key</b> <Ctrl><Shift><3>	Link to a page on the OCLC web site that lists Connexion online tutorials. Tutorials available: <ul style="list-style-type: none"> <li>Using Connexion, An OCLC Tutorial. Covers essential cataloging functionality in the Connexion browser interface, including retrieving, editing, and taking final actions on bibliographic records.</li> <li>CatExpress tutorial</li> <li>WebDewey tutorial</li> <li>Pathfinders tutorial</li> </ul>
OCLC Cataloging Label Program <b>Shortcut Key</b> <Ctrl><Shift><4>	Link to the product page for the OCLC Cataloging Label Program. From this page, you can <ul style="list-style-type: none"> <li>Download the Label Program software.</li> <li>View the TourGuide (brief online tutorial) for the label program.</li> <li>View or download documentation.</li> <li>Find other resources to help you use the product effectively.</li> </ul>

Link	Description
Product Services Web <b>Shortcut Key</b> <Ctrl><Shift><5>	Link to OCLC Product Services Web site (PSW). <ul style="list-style-type: none"> <li>Click to log on automatically to PSW using the authorization and password currently visible on the logon screen.</li> <li>The link takes you directly to the Records and Reports screen in Product Services Web.</li> </ul> Product Services provides product support information and records and reports for viewing and downloading. Use OCLC Product Services Web to: <ul style="list-style-type: none"> <li>Download records and reports.</li> <li>Download macros and scripts.</li> <li>Download software and documentation.</li> <li>Find product support and product information.</li> <li>Read answers to Frequently Asked Questions.</li> </ul> <b>Authorization and password required.</b> <ul style="list-style-type: none"> <li>To download records and reports or software and documentation, you must log on to PSW with a valid OCLC authorization.</li> <li>Automatic logon to PSW uses your default Connexion authorization and password, if any.</li> <li>Or type the authorization and password you want to use.</li> </ul> <b>More?</b> For more information about Product Services Web, see the PSW Reference Card at <a href="http://www.oclc.org/support/documentation/pdf/pswrefcard.pdf">http://www.oclc.org/support/documentation/pdf/pswrefcard.pdf</a>
OCLC Usage Statistics <b>Shortcut Key</b> <Ctrl><Shift><6>	Link to OCLC Usage Statistics. <ul style="list-style-type: none"> <li>Click to log on automatically to the Usage Statistics server using the authorization and password currently visible on the logon screen.</li> <li>The link takes you directly to a screen listing the Connexion statistics available for your institution.</li> </ul> For more information on the available reports and instructions for viewing reports, click <b>Help</b> on the Usage Statistics screen.
System Alerts <b>Shortcut Key</b> <Ctrl><Shift><7>	Link to the OCLC System Alerts page. If you have difficulties while logging on to Connexion or while using the system, check this page for information on any known system problems.

**Set up automatic logon (Local Browser Settings)**

- You can save your Connexion authorization number and password to avoid retying this information each time you log on.
- You can save up to ten authorizations and passwords and then select the authorization to use when logging on. If desired, you can set your most-used authorization as the default.
- You can assign a name (up to 8 characters) to each authorization/password pair to specify a purpose, type (Limited, Full, etc.), project, user's name, or other identifier.
- For each entry, you can save authorization number only or authorization and password. You can designate a saved authorization as Dewey Services only.
- The logon information you supply is saved by your browser as a cookie. The cookie, a small text file, resides on your workstation, in your browser's cookies

folder. If you use multiple browsers to access Connexion (for example, if you use both Internet Explorer and Netscape), you must save the Local Browser Settings in each browser.

- As a security measure, the system encrypts your authorization and password both when storing them on your workstation and when sending them to the Connexion browser.
- To save your authorization and/or password, you must enable cookies in your browser.

**Use Local Browser Settings**

To do this	Procedure
Save a default authorization	<ol style="list-style-type: none"> <li>1. Type an authorization number (required).</li> <li>2. Type a password (optional). If you prefer to enter the password each time you log on, leave the Password box empty.</li> <li>3. In the Name box, type an identifier (up to 8 characters) for the authorization/password combination (optional).</li> <li>4. In the Dewey-Only box, type <b>Y</b> or <b>N</b> (required).</li> <li>5. <b>Set as default authorization.</b> Click to select the <b>Default</b> option button for the authorization you entered. Or select <b>No Default Authorization</b>.</li> <li>6. When finished, click <b>Save Settings</b>. Then click <b>OK</b>.</li> </ol>
Save multiple authorizations	<ol style="list-style-type: none"> <li>1. For each entry,               <ul style="list-style-type: none"> <li>— Type an authorization number (required).</li> <li>— Type a password (optional). If you prefer to enter the password each time you log on, leave the Password box empty.</li> <li>— In the Name box, type an identifier (up to 8 characters) for the authorization/password combination (optional).</li> <li>— In the Dewey-Only box, type <b>Y</b> or <b>N</b> (required).</li> </ul> </li> <li>2. Repeat step 1 to add another entry.</li> <li>3. <b>Set a default authorization (optional).</b> Click to select the Default option button for the authorization you want to use. Or select <b>No Default Authorization</b>.</li> <li>4. When finished, click <b>Save Settings</b>. Then click <b>OK</b>.</li> </ol>
View list of saved authorizations and names	<ol style="list-style-type: none"> <li>1. On the login screen, open the Choices list and click the <b>last</b> item, <b>More Details</b>.</li> <li>2. In the Authorization List window, click an authorization number to select it. Or click <b>Close Window</b> to return to the login screen.</li> </ol> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>• When you click an authorization number, the Authorization List window closes and the selected authorization appears on the login screen, ready for use.</li> </ul>

To do this	Procedure
No default authorization	<ol style="list-style-type: none"> <li>Click to select the option button for <b>No Default Authorization</b>.</li> <li><b>(Optional) Default Dewey-Only logon.</b> To set the Dewey-Only Session logon screen as the default, change the Dewey-Only setting to <b>Y</b>.</li> <li>Click <b>Save Settings</b>. Then click <b>OK</b>.</li> </ol>
Save new or changed settings	<ul style="list-style-type: none"> <li>Click <b>Save Settings</b>.</li> </ul> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>The system displays a confirmation message.</li> <li>When you click <b>OK</b>, the Local Browser Settings window closes.</li> </ul>
Undo changes, restore previously saved settings	<ul style="list-style-type: none"> <li>Click <b>Reset</b>.</li> </ul> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>The system cancels any changes you made since you opened the Local Browser Settings window.</li> <li>Settings previously saved (if any) appear on the screen. Or the system restores the original system defaults (all text removed, no default authorization).</li> </ul>
Restore system defaults (delete all entries)	<ol style="list-style-type: none"> <li>Click <b>System Defaults</b>.</li> <li>Click <b>OK</b> to confirm that you want to erase all saved authorizations/passwords and set Dewey-Only options to <b>No</b>.</li> </ol> <p><b>Results</b></p> <ul style="list-style-type: none"> <li>Authorization numbers, passwords, and Dewey-Only settings are removed.</li> <li><b>No Default Authorization</b> is selected, with Dewey-Only set to <b>No</b>.</li> </ul>

**Why use a Dewey-Only session?**

**Benefits for OCLC cataloging users:**

- Session does not incur access and user support fees.
- Session does not count against simultaneous logon limits for libraries subscribing to Flat Fee Internet access.
- Dewey-only sessions have a default inactivity timeout of 120 minutes (default timeout for other Connexion sessions is 40 minutes).
- You can start a Dewey-only session from within Connexion cataloging session via automatic logon.
- You can start a cataloging session via automatic logon from within a Dewey-only session.
- You can have both a cataloging session and a Dewey-only session open at once and switch between them while working. You are charged access and user support fees for the cataloging session as long as that session remains open.

**Benefits for Dewey Services subscribers:**

- The 120-minute inactivity timeout lets you remain logged on to WebDewey and/or Abridged WebDewey while you switch to another application to complete other

cataloging tasks. Your Dewey Services session stays active, ready for use when you need it.

**Start cataloging session or Dewey-Only session**

**Start Dewey-Only session**

Start session	Procedure
Default Dewey-Only session	<p>If you designate your default authorization as <b>Dewey-Only</b> (in Local Browser Settings), the system automatically displays the Dewey-only logon screen.</p> <ol style="list-style-type: none"> <li>Enter authorization and password:                             <ul style="list-style-type: none"> <li>— <b>Default authorization and password.</b> Use the displayed authorization. Type the password if not already supplied.</li> <li>— <b>Multiple saved authorizations.</b> Select a saved authorization from the list. Type the password if not already supplied.</li> <li>— Or type an authorization number and password.</li> </ul> </li> <li>Click <b>Logon to Dewey-Only Session</b> or press &lt;Enter&gt;.</li> </ol> <p><b>Result</b></p> <ul style="list-style-type: none"> <li>The system starts a Dewey-Only session and displays the Connexion home screen.</li> </ul>
From Connexion cataloging logon screen	<ol style="list-style-type: none"> <li>Under Related Links, click <b>Dewey-Only Session</b>.</li> <li>Enter authorization and password:                             <ul style="list-style-type: none"> <li>— <b>Default authorization and password.</b> Use the displayed authorization. Type the password if not already supplied.</li> <li>— <b>Multiple saved authorizations.</b> Select a saved authorization from the list. Type the password if not already supplied.</li> <li>— Or type an authorization number and password.</li> </ul> </li> <li>Click <b>Logon to Dewey-Only Session</b> or press &lt;Enter&gt;.</li> </ol> <p><b>Result</b></p> <ul style="list-style-type: none"> <li>The system starts a Dewey-Only session and displays the Connexion home screen.</li> </ul>

Start session	Procedure
<p>From Connexion cataloging session</p> <p><b>Shortcut Key</b> &lt;Alt&gt;&lt;N&gt;</p>	<ul style="list-style-type: none"> <li>• On the Dewey Services tab, under Show Options, click <b>Start Dewey-Only</b>. Or press &lt;Alt&gt;&lt;N&gt;.</li> </ul> <p><b>Result</b> The system</p> <ul style="list-style-type: none"> <li>• Opens a new browser window for the Dewey-Only session.</li> <li>• Logs you on automatically to the new session.</li> <li>• Selects the Dewey Services tab and displays the screen you specified as the Dewey Session Start Page (on the Dewey Services Options screen, under New Session Options).</li> </ul> <p><b>Specify starting screen for Dewey-Only session</b></p> <ul style="list-style-type: none"> <li>• On the Dewey Services Options screen, under New Session Options, use the list labeled <b>Dewey-Only Session Start Page</b> to select the screen you want displayed immediately after you start a new Dewey-only session from a cataloging session.</li> </ul> <p><b>Default setting:</b> Search WebDewey (or Search Abridged WebDewey).</p> <p><b>Choices</b> (available options determined by your subscription): Search WebDewey, Browse WebDewey, Search Abridged WebDewey, and Browse Abridged WebDewey.</p>

**Start cataloging session**

Start session	Procedure
<p>Default cataloging session</p>	<p>Unless you designate your default authorization as <b>Dewey-Only</b> (in Local Browser Settings), the system automatically displays the logon screen for a cataloging session.</p> <ol style="list-style-type: none"> <li>1. Enter authorization and password:             <ul style="list-style-type: none"> <li>— <b>Default authorization and password.</b> Use the displayed authorization. Type the password if not already supplied.</li> <li>— <b>Multiple saved authorizations.</b> Select a saved authorization from the list. Type the password if not already supplied.</li> <li>— Or type an authorization number and password.</li> </ul> </li> <li>2. Click <b>Logon</b> or press &lt;Enter&gt;.</li> </ol> <p><b>Result</b></p> <ul style="list-style-type: none"> <li>• The system starts a cataloging session and displays the Connexion home screen.</li> </ul>

Start session	Procedure
From Dewey-Only logon screen	<ol style="list-style-type: none"> <li>1. Under Related Links, click <b>Cataloging Session</b>.</li> <li>2. Enter authorization and password:                             <ul style="list-style-type: none"> <li>— <b>Default authorization and password.</b> Use the displayed authorization. Type the password if not already supplied.</li> <li>— <b>Multiple saved authorizations.</b> Select a saved authorization from the list. Type the password if not already supplied.</li> <li>— Or type an authorization number and password.</li> </ul> </li> <li>3. Click <b>Logon</b> or press &lt;Enter&gt;.</li> </ol> <p><b>Result</b></p> <ul style="list-style-type: none"> <li>• The system starts a cataloging session and displays the Connexion home screen.</li> </ul>
From Dewey-Only session <b>Shortcut Key</b> <Alt><N>	<ul style="list-style-type: none"> <li>• On the Dewey Services tab, under Show Options, click <b>Start Cataloging</b>. Or press &lt;Alt&gt;&lt;N&gt;.</li> </ul> <p><b>Result</b></p> <p>The system</p> <ul style="list-style-type: none"> <li>• Opens a new browser window for the Cataloging session.</li> <li>• Logs you on automatically to the new session.</li> <li>• Selects the Cataloging tab and displays the screen you specified as the Cataloging Session Start Page (on the Dewey Services Options screen, under New Session Options).</li> </ul> <p><b>Specify starting screen for Cataloging session</b></p> <ul style="list-style-type: none"> <li>• On the Dewey Services Options screen, under New Session Options, use the list labeled <b>Cataloging Session Start Page</b> to select the screen you want displayed immediately after you start a new cataloging session from a Dewey-only session.</li> </ul> <p><b>Default setting:</b> Search WorldCat. <b>Choices:</b> Search WorldCat, Browse WorldCat, Search Authorities, and Browse Authorities.</p>

**Switch between active sessions: tips**

- **Switch sessions via the taskbar.** When you have both a cataloging session and a Dewey-only session open, you can use the Windows taskbar to switch between the sessions. To switch,
  - Click the browser icon for the session you want to use.
  - Or press <Alt><Esc> to move through all running programs to reach the window for the session you want.
  - Or press <Alt><Tab> to select the correct browser icon from a list of icons for all running programs.
- **Shortcut to start new session.** The keyboard shortcut <Alt><N> automatically opens a new session.
  - In a Dewey-Only Session, pressing <Alt><N> opens a cataloging session.
  - In a cataloging session, pressing <Alt><N> opens a Dewey-Only session.

- **Which session is this?**

- In a **Dewey-Only** session, **only** the Dewey Services tab and the General tab are present.
- In a **cataloging** session, the Cataloging and/or Authorities tab(s) are present; tabs for other Connexion services may also appear, depending on your authorization and your customization of the interface.

**Log off (end session)**

	<b>Action</b>
1	<p>At the right end of the header bar at the top of the screen, click <b>Logoff</b> or press &lt;Alt&gt;&lt;L&gt;.</p> <p>If no records remain in edit mode, the system ends your session and displays the logoff screen.</p> <p>The <b>logoff screen</b> lists the time you logged on, the time you logged off, and the duration of your session. At the bottom of the logoff screen is a link to the logon screen, so that you can log on again conveniently.</p>
2	<p>If any records remain in edit mode, the system notifies you that you will lose your edits unless you <b>save the records</b> or <b>complete the records</b> (add them to, or replace them in, the appropriate database) before logging off. You can</p> <ul style="list-style-type: none"> <li>• <b>Log off and discard unsaved edits.</b> On the message screen, click <b>Logoff Anyway</b>.</li> <li>• Or</li> <li>• <b>Complete edits and save, add, or replace record(s).</b> On the message screen, click <b>Show Active Records</b>. At the Active Records screen, find the section for the service and/or database you were using. To view a record, click the hyperlinked <b>title</b> of the record you want.</li> <li>• When finished completing or saving records, on the header bar click <b>Logoff</b> or press &lt;Alt&gt;&lt;L&gt;.</li> </ul> <p><b>Note: Turn off logoff warning for active records</b></p> <p>If you prefer <b>not</b> to be notified about active records before logging off, use the <b>Show or Hide Logoff Warning</b> option to prevent the system from displaying this warning.</p> <ol style="list-style-type: none"> <li>1. On the General tab, click <b>Admin</b>. On the Preferences screen, click <b>General Options</b>. Then click <b>Interface Customization Options</b>.</li> <li>2. On the Interface Customization Options screen, find the <b>Show or Hide Logoff Warning</b> option and select <b>Hide</b>.</li> </ol>

**End session via automatic logoff**

- With **automatic logoff turned on** (the default setting), you can also end a session by closing your browser.

**No automatic logoff (not recommended)**

- **If you turn off the automatic logoff function**, closing the browser does not end a session. The session remains active until the Connexion server ends it after 40 minutes of inactivity.
- **Note:** Setting a shorter inactivity timeout period via the **Session Timer** option does not work to end a session after you close the browser. The browser, not the Connexion server, monitors inactivity intervals less than 40 minutes.

- When a session remains open, the system treats that session as a regular user session. The open session counts against simultaneous logon limits for libraries that subscribe to Flat Fee Internet access. You (or others from your institution) may be unable to log in again until an inactivity timeout ends the “lost” session.
- OCLC User & Network Support staff can end the active session. .

### About the session timer and inactivity timeout

#### Inactivity timeout

- The inactivity timer ends a session automatically after a period of no interaction with the server.
  - For cataloging sessions, 40 minutes of inactivity is the default setting.
  - For Dewey Services-only sessions, the default inactivity timeout is 120 minutes.
- For cataloging sessions, you can specify automatic logoff after as little as 10 minutes of inactivity. This setting uses a timer monitored by the browser. If you close the browser without logging off, the 40-minute inactivity period monitored by the server is in effect. However, the automatic logoff function (on by default) ends the session when the browser closes.

**Note: Not for Dewey-only sessions.** The option to shorten the inactivity timeout is not available for Dewey Services-only sessions. It is not needed because Dewey-only sessions do not incur access and user support fees or count against simultaneous-session limits.

- The inactivity timer prevents a session from remaining open indefinitely (and incurring access and user support fees) after a user stops working but neither logs off nor closes the browser. Specifying a shorter inactivity timeout further reduces the potential for problems caused by unused sessions.

#### Why unexpected timeouts can occur

- The system cannot recognize activity that does not involve interaction with the server.
- When you edit or type in a text box, for example, you are working locally: changes occur on the displayed screen, but you do not interact with the server. The system does not recognize these changes as activity until you take an action that involves the server; for example: starting a search or browse, selecting a record from search results, saving a user note, etc.
- If you spend more than 40 minutes working locally without taking an action that requires interacting with the server, the inactivity timer may log you off.

#### Prevent unexpected timeouts

- **Timer display.** Check the time remaining before a timeout on the digital timer display. You can locate the countdown timer on the header bar or on the status bar. The display shows the number of minutes and seconds remaining before an inactivity timeout will occur. For cataloging sessions, the timer counts down from 40 minutes (or an interval of 10 to 40 minutes you specify) until you interact with

the server (120 minutes for Dewey-only sessions). After each interaction, the timer resets and counts down again until the next interaction.

- **Timeout warning.** The system automatically warns you 5 minutes before a session is about to expire due to inactivity. You can specify that the warning appear from 1 minute to 9 minutes before the session will expire. And you can have the message appear in a pop-up box (instead of in the menu area or the Connexion screen) to make it more noticeable.
- **More frequent interaction.** While working, periodically take an action such as switching screens, moving between records and a results list, etc. Make a habit of interacting every few minutes, just as you make a habit of saving your work often while using desktop software.

### 3 Accessibility features

#### Accessibility features (Connexion browser)

- Accessibility features make it easier for users with disabilities to use Connexion browser effectively. The Connexion browser interface is compliant with most of the United States Section 508 requirements. Blind users, or users with limited vision, may use a screen reader to read the text and properly marked-up images on the page. Users with limited manual dexterity or limited eye-hand coordination can use the keyboard to access functionality usually accessed with a mouse.
- Accessibility features can also provide additional capabilities for all users, provided that their browsers support those features. All versions of Internet Explorer, FireFox and other browsers that are officially supported by Connexion can provide the features listed in this topic. Note that internal errors ("bugs") in the browser can sometimes prevent features from working as expected.

#### List of accessibility features

- **Keyboard shortcuts.** Keyboard shortcuts allow you to click a button or link, or select from a list, by combining the <Alt> key (or <Ctrl> or <Ctrl><Shift> keys) with another key. Once you log on to Connexion browser, you can view a list of all keystroke shortcuts by pressing <Shift><F7>. To print the list of shortcuts, click the **Print** button at the top of the list window.
- **Hover text for images, form elements, and some links.** All graphical buttons and icons that convey information have associated text that appears when you hover the cursor over them. The HTML coding for image text uses both the ALT attribute and the TITLE attribute for maximum compatibility with screen readers. Buttons that are generated by JavaScript without images do not have mouseover text because screen readers can access the button text directly.
- **Tables.** Most tables use the TH (table heading) tag for row and column headings and the TD (table data) tag for data. Some screen readers use this information to associate row and column headings with individual cells.
- **Skip navigation** The cursor is automatically positioned to the first input field below the repetitive navigation links that appear on every screen. In addition, a keyboard shortcut is provided that skips the repetitive links and positions to the end of the repetitive navigation area.
- **Resizable text.** All text outside of images in Connexion browser is resizable in the browser, so users with limited vision can request larger text if desired.
- **Other features.** The administrative area provides several accessibility options on the Interface Customization Options screen. (To access these settings, on the General tab, click the **Admin** button, select General Options, and then click **Interface Customization**.) These options include:
  - **Optimize Images.** allows use of images instead of text for the tabs and oval action buttons in the upper navigation area, as well as in many (but not all) other lower areas of the application.
  - **Show or Hide Go Button.** places a Go button in the navigation area so that JavaScript will not automatically activate a choice highlighted on one of the navigation lists (Search, Browse, Create, and Show). This option does not yet apply to areas other than the navigation bar, but the keystroke <Alt><DownArrow> can be used in supported browsers to make selection from

those lists (such as the Edit, Action, and View lists on record screens) more accessible.

- **Session Timer Options.** provides options that allow a visible warning which can be detected by screen readers when your session is ready to expire, and a button that can be used to extend the session.
- **Size of Tab Images and Text in Navigation Bar.** provides a much larger set of navigation tabs and buttons for those who have chosen to resize text significantly.

## 4 Active Records screen

### Why use the Active Records screen?

- Resume editing a record after interrupting your work.
- Switch between multiple active records.
- If Connexion warns you at logoff that you have unsaved, edited records, review your active records and decide whether to save or complete them before logging off.

### Record list

- The Active Records screen lists records currently in edit mode, in any database to which you have access.
- Records are listed under headings that indicate the record type or the database from which you retrieved the record.
- Headings appear only for categories in which you have active records.
- Within each category, the last-opened record appears at the top of the list. The record opened first appears at the bottom.
- For bibliographic and authority records, the list includes both locked master records and copies of records you are editing for local use.
- The Active Records screen also lists new records or constant data records you have not yet saved or added to a database.
- The CatExpress service does not use the Active Records screen.

### Go to Active Records screen

Action
<p><b>Keystroke shortcut</b></p> <ul style="list-style-type: none"><li>• On any screen, press &lt;Ctrl&gt;&lt;Shift&gt;&lt;9&gt;.</li></ul> <p><b>Navigation bar button or keystroke</b></p> <ul style="list-style-type: none"><li>• On any tab, click <b>Show</b> or press &lt;Alt&gt;&lt;4&gt;.</li></ul> <p><b>View listed record</b></p> <ul style="list-style-type: none"><li>• On the Active Records screen, the record most recently opened in edit mode, within the top category on the screen, is highlighted.</li><li>• To view the highlighted record, press &lt;Enter&gt;.</li><li>• Press &lt;Tab&gt; or &lt;Shift&gt;&lt;Tab&gt; to move to other records in the list. <b>Note:</b> Highlighting disappears when you press &lt;Tab&gt; or &lt;Shift&gt;&lt;Tab&gt; to select another listed record.</li></ul> <p><b>Note:</b> The Active Records screen is <b>not available</b> from the Express tab (CatExpress service) or the General tab.</p>

Active Records categories

Category	Description
<p>Bibliographic Records  <b>Note:</b> Active <b>local holdings records</b> and/or <b>institution records</b> linked to a bibliographic record are listed under the master bibliographic record to which they are attached.</p>	<ul style="list-style-type: none"> <li>• The <b>Bibliographic Records</b> category lists records retrieved from WorldCat and newly created records (workforms).</li> <li>• The link for each active record includes the OCLC control number and the title or (if the record contains no title) <b>No Title Provided</b>.</li> <li>• For a locked master record, the link includes the label <b>(Locked)</b>.</li> <li>• For new records (not yet saved or added to WorldCat), the link shows only the title or <b>No Title Provided</b>.</li> <li>• The link to an active <b>local holdings record (LHR)</b> or LHR workform appears under the link to the bibliographic record to which the LHR is attached. The link on the Active Records screen shows the OCLC symbol of the institution that owns the LHR, and the location (holding library code) associated with the LHR.</li> <li>• The link to an active <b>institution record (IR)</b> or IR workform appears under the link to the bibliographic record to which the IR is attached. The link on the Active Records screen identifies the institution that owns the IR.</li> </ul>
<p>Bibliographic Save File</p>	<ul style="list-style-type: none"> <li>• The <b>Bibliographic Save File</b> category lists records retrieved from the save file.</li> <li>• The link for each active record includes the save file number and the title or (if the record contains no title) <b>No Title Provided</b>.</li> <li>• For a locked master record, the link includes the label <b>(Locked)</b>.</li> </ul>
<p>Bibliographic Constant Data</p>	<ul style="list-style-type: none"> <li>• The <b>Bibliographic Constant Data</b> category lists records retrieved from the constant data database and newly created constant data records.</li> <li>• The link for an active constant data record shows the <b>constant data name</b>.</li> <li>• For a newly created CD record, the link text is <b>New</b>.</li> </ul>
<p>Local Holdings Constant Data</p>	<ul style="list-style-type: none"> <li>• The <b>Local Holdings Constant Data</b> category lists records retrieved from the LH constant data database and newly created LH constant data records.</li> <li>• The link for an active LH constant data record shows the <b>constant data name</b>.</li> <li>• For a newly created LH CD record, the link text is <b>New</b>.</li> </ul>
<p>Authority Records</p>	<ul style="list-style-type: none"> <li>• The <b>Authority Records</b> category lists records retrieved from the Connexion Authority file and newly created authority records (workforms).</li> <li>• The link for each active record includes the ARN and the main entry or (if the record contains no main entry) <b>No Main Entry Provided</b>.</li> <li>• For a locked master record, the link includes the label <b>(Locked)</b>.</li> <li>• For a new authority record (not yet saved or added to the Authority File), the link shows only the main entry or <b>No Main Entry Provided</b>.</li> </ul>

Category	Description
Authority Save File	<ul style="list-style-type: none"> <li>The <b>Authority Save File</b> category lists records retrieved from the save file.</li> <li>The link for each active record includes the save file number and the main entry or (if the record contains no main entry) <b>No Main Entry Provided</b>.</li> <li>For a locked master record, the link includes the label <b>(Locked)</b>.</li> </ul>
Authority Constant Data	<ul style="list-style-type: none"> <li>The <b>Authority Constant Data</b> category lists records retrieved from the constant data database and newly created constant data records.</li> <li>The link for an active constant data record shows the <b>constant data name</b>.</li> <li>For a newly created CD record, the link text is <b>New</b>.</li> </ul>
WebDewey User Notes or Abridged WebDewey User Notes	<p>The <b>User Notes</b> categories show the following types of hyperlinks for active user notes:</p> <ul style="list-style-type: none"> <li>Notes are identified by <b>title</b>.</li> <li>Note workforms not yet saved are also identified by title.</li> <li>For a Note workform without a title, the hyperlink text is <b>No Title Provided</b>.</li> </ul>
Digital Archive Records	<ul style="list-style-type: none"> <li>The <b>Digital Archive Records</b> category lists records retrieved from the Digital Archive and newly created records.</li> <li>The link for each active record includes the control number (assigned when the record was added to the DA database) and the title or (if the record contains no title) <b>No Title Provided</b>.</li> <li>For a new record (not yet saved or added to the Digital Archive), the link shows only the title or <b>No Title Provided</b>.</li> </ul>
Digital Archive Save File	<ul style="list-style-type: none"> <li>The <b>Digital Archive Save File</b> category lists records retrieved from the save file.</li> <li>The link for each active record includes the save file number and the title or (if the record contains no title) <b>No Title Provided</b>.</li> </ul>
Digital Archive Constant Data	<ul style="list-style-type: none"> <li>The <b>Digital Archive Constant Data</b> category lists records retrieved from the constant data database and newly created constant data records.</li> <li>The link for an active constant data record shows the <b>constant data name</b>.</li> <li>For a newly created CD record, the link text is <b>New</b>.</li> </ul>
Pathfinders	<ul style="list-style-type: none"> <li>The <b>Pathfinders</b> category lists pathfinders retrieved from the pathfinders database and newly created pathfinders.</li> <li>The link for each active pathfinder includes the pathfinder number and the title or (if the pathfinder contains no title) <b>No Title Provided</b>.</li> <li>For a new pathfinder (not yet saved or added to the pathfinders database), the link shows only the title or <b>No Title Provided</b>.</li> </ul>

Category	Description
Pathfinder Save File	<ul style="list-style-type: none"> <li>The <b>Pathfinder Save File</b> category lists records retrieved from the save file.</li> <li>The link for each active pathfinder includes the save file number and the title or (if the pathfinder contains no title) <b>No Title Provided</b>.</li> </ul>
Pathfinder Constant Data	<ul style="list-style-type: none"> <li>The <b>Pathfinder Constant Data</b> category lists records retrieved from the constant data database and newly created constant data records.</li> <li>The link for an active constant data record shows the <b>constant data name</b>.</li> <li>For a newly created CD record, the link text is <b>New</b>.</li> </ul>

**Record used to create a new record not on Active Records screen**

- When you create a new bibliographic record or authority record (using the Derive New Record action), or clone a pathfinder, the **base** record (the record you derived from or the pathfinder you cloned) is no longer listed on the Active Records screen.
- The link for the new record or pathfinder contains the title or main entry only (not a record number or save file number).

## 5 System home page and navigation bar

**About the home page** The home page is the first screen you see after you log on to OCLC Connexion.

To return to the home page at any time, click **Home** on the header bar at the top of the screen.

Use the home page to

- View the OCLC Cataloging Message of the Day.
- Find links to documentation, news, and instructions.

**Message of the Day** The OCLC Cataloging Message of the Day appears in the center of the home page.

**View OCLC system news** The **News** area provides access to current information of interest to OCLC users. News topics include:

- General OCLC announcements
- News about specific products and services
- Release notes describing recent system updates
- Information on planned system enhancements

### Access OCLC system news

Action	Result
On the General tab, click <b>News</b> . Or On the home page, in the gray column on the right, under Topics, click <b>News</b> .	The Search News screen appears. To find items of interest, you can <ul style="list-style-type: none"> <li>• Retrieve all current News items</li> <li>• Retrieve News by category</li> <li>• Search for words in the titles of News items</li> <li>• Search for words in the contents of News items</li> </ul>

**Topics and Useful Links** The gray column on the right provides quick access to information and tools for Connexion users:

- Search screen for searching OCLC System News.
- Documentation for OCLC Connexion.
- Product information on OCLC Connexion and related cataloging services.
- WorldCat statistics page on the OCLC web site.
- The OCLC System Alerts page. If you have difficulties while using the system, check this page for information on any known system problems.
- Web-based forms for requesting changes to WorldCat records or Authority File records, and for requesting a merge of duplicate records.

- OCLC Usage Statistics, a Web application that lets you view statistics on cataloging activity for your institution or for your authorization.
- Legal information such as software license terms and copyright statements.
- Information to help you identify and resolve problems with Connexion browser. The **Known problems and troubleshooting** link displays a page on the OCLC Web site that lists known problems and provides a troubleshooting checklist.

**Navigation Bar**

- Appears at the top of all screens.
- Contains a set of tabs, one tab for each service available to you. Your authorization and/or subscriptions to specific services determine which service tabs appear.
- On each service tab, provides buttons labeled Search, Browse, Create, and Show. Click a button for access to a frequently used function.
- On each service tab, provides lists labeled Search Options, Browse Options, Create Options, and Show Options. Open an Options list to select a specific function.
- Includes a **General** tab that lets you set preferences to customize the navigation bar, assign shortcut keys to frequently used actions, set service-specific options, access OCLC System News, and view web-based documentation for OCLC Connexion.
- Lets you navigate by clicking a tab, a button, or an item on an Options list.
- Supports keyboard-only navigation if you prefer to avoid using a mouse.
- **Can be customized to meet your needs.** For example, you can hide tabs for services you rarely use, add a horizontal scroll bar, enlarge the tabs and text, or facilitate keyboard-only access to the Options lists.
- The header bar is the black bar at the top of each screen, above the navigation bar.
- Via links on the header bar, you can access the functions listed in the following table.

Header link	Use it to
Home	Return to the system home page.
Help	Get context-specific help for the current screen. From the Help window, you can search Help for additional information.
Diacritics	View a table of diacritics and special characters. Use the table to identify a character, find a character by name, or copy a character for input in a record.

Header link	Use it to
Contact	Send a problem or question via e-mail to your regional network, service center, or OCLC User and Network Support. Send a suggested change or enhancement via e-mail to the OCLC product specialists.
Logoff	Log off the system and return to the login page.

**Navigation keys**

- You can use tabs, buttons, and Options lists on the navigation via keyboard only.
- The keystrokes work in all supported versions of Internet Explorer and in supported versions of Netscape 6.x and Netscape 7.
- Sometimes a keystroke does not work because the navigation bar is not the active frame (screen area). If a keystroke should work but does not, click once on the navigation bar to make it the active frame. (Click the open area at the right end of the navigation bar.) Then repeat the keystroke.

Purpose	Keystroke
<b>Header bar -- select an action</b>	
Home	<Alt><O>
Help	<Alt><H>
Contact (Support)	<Alt><S>
Diacritics	<Alt><,> (comma)
Logoff	<Alt><L>
<b>Tabs -- select a tab (if it is visible on screen)</b>	
Cataloging	<Alt><C>
Authorities	<Alt><A>
Pathfinders	<Alt><P>
Express	<Alt><E>
Dewey Services	<Alt><D>
Digital Archive	<Alt><I>
General	<Alt><G>
More	<Alt><M>
<b>Buttons -- select a button (on active tab)</b>	
Search Or News on General tab	<Alt><1>
Browse Or Admin on General tab	<Alt><2>

Purpose	Keystroke
Create Or Documentation on General tab	<Alt><3>
Show	<Alt><4>
<b>Options lists -- select list (on active tab)</b> <b>Go button off.</b> If you did not add a Go button to the navigation bar, <ul style="list-style-type: none"> <li>• Press the shortcut key for the Options list.</li> <li>• Then press &lt;down-arrow&gt; once to select first item on the list.</li> </ul> <b>Go button on.</b> If you added a <b>Go</b> button to the navigation bar, <ul style="list-style-type: none"> <li>• Press the shortcut key for the Options list.</li> <li>• Then press &lt;down-arrow&gt; to select an option.</li> <li>• Then press &lt;Enter&gt; to take action (if you have not moved the cursor from the Options list).</li> <li>• Or press &lt;Alt&gt;&lt;8&gt; to take action (if you moved the cursor to a position in the lower frame of the screen).</li> </ul>	
Search Options	<Alt><I>
Browse Options Or Admin Options on General tab	<Alt><@>
Create Options	<Alt><#>
Show Options	<Alt><\$>
Other Options Express tab only	
<b>Bypass navigation bar</b> <b>Note:</b> This function is included to facilitate use of screen-reading software.	
Skip links on header bar and tabs; move to end of navigation bar. Press <Tab> to move to first field or list on current screen.	<Ctrl><K> Or <Alt><F9>
<b>Switch between navigation bar and main frame (record or dialog box)</b>	
Move from navigation bar to record/ dialog frame Or move to navigation bar from record/dialog frame	<Ctrl><Shift><Tab> (Internet Explorer) Or <Ctrl><Tab> (Netscape 6)

**Keystrokes for search and browse screens**

**Note:** You cannot customize these keystrokes.

To go to this screen	Press these keys
Search WorldCat	<Ctrl><Shift><W>
Search Bibliographic Save File	<Ctrl><Shift><T>
Search Authority File	<Ctrl><Shift><J>
Search Authority Save File	<Ctrl><Shift><O>
Browse WorldCat (Title Phrase or Scan Title search)	<Ctrl><Shift><B>

To go to this screen	Press these keys
Browse Authority File	<Ctrl><J>
View WorldCat Search History	<Alt><=> (Alt + equal sign)
WorldCat Group Results	<Ctrl><0>
WorldCat Search Results	<Ctrl><1>
Bibliographic Save File Search Results	<Ctrl><3>
Bibliographic Constant Data Search Results	<Ctrl><4>
WorldCat Browse Results	<Ctrl><6>
Bibliographic Review File Search Results	<Ctrl><7>
Local Holdings Group Summary	<Ctrl><8>
Local Holdings Institution Summary	<Ctrl><9>
Local Holdings Constant Data Search Results	<Ctrl><-> (hyphen)
Authority File Search Results	<Ctrl><Shift><0>
Authority Save File Search Results	<Ctrl><Shift><1>
Authority Constant Data Search Results	<Ctrl><Shift><3>
Authority File Browse Results	<Ctrl><Shift><4>
Authority Review File Search Results	<Ctrl><Shift><7>
Show Active Records	<Ctrl><Shift><9>
Search Dewey User Notes	<Ctrl><Shift><[> (left square bracket)
Search Abridged Dewey User Notes	<Ctrl><Shift><]> (right square bracket)
Show/Hide WorldCat Quick Search (Record Views and Search Results)	<Alt><Q>
Move to WorldCat Quick Search (Record Views and Search Results)	<Alt><. > (Alt + period)
Show/Hide Record Viewing Buttons (Search results for specific databases only)	<Alt><Y>

**New session (Dewey-only or cataloging)**

- To use both a cataloging session and a Dewey-Only session, you need an OCLC cataloging authorization and a subscription to WebDewey or Abridged WebDewey.
- **Note:** You cannot customize this keystroke.

To	Press these keys
Start a new Dewey-Only session from a cataloging session	<Alt><N>

To	Press these keys
Start new cataloging session from a Dewey-Only session	<Alt><N>

**Special purpose keystrokes**

**Note:** You cannot customize these keystrokes.

To	Press these keys
Enter diacritics or special characters using a popup character chart window	<F7>
List all keystrokes	<Shift><F7>
Enter MARC subfield delimiter (\$)	<F8>
Print bibliographic or authority record	<F12>
Download Export Files screen	<Ctrl><[> (left square bracket)
Download Label Files screen	<Ctrl><]> (right square bracket)
Show Command Lists (Edit, Action, and View lists)	<Alt><J>
Show Command Shortcuts (alphabetical list of available commands and shortcuts, above record view)	<Alt><K>
Show or hide Dewey Services work area	<Alt><W>
Move cursor to Dewey Services work area	<Alt><. > (period)
Open Dewey work area dialog box	<Alt><Shift><. > (period)
Show Dewey Tables (Dewey Services tab only)	<Ctrl><[> (left square bracket)
Show Abridged Dewey Tables (Dewey Services tab only)	<Ctrl><]> (right square bracket)
Search OPAC for Dewey Number (Dewey Services tab only)	<Alt></> (slash)
Move between first fixed-field element and first variable field (bibliographic and authority records)	<Alt></> (slash)
Move to the top or bottom of the record screen.	<Ctrl><Home> to move to the first input box on the screen. <Ctrl><End> to move to the last input box on the screen.
Show or hide the Functions list (bibliographic or authority records in template editing views)	<Alt><Y>
Go to the Active Records screen	<Ctrl><Shift><9>

**View and print list of keystrokes**

- **Shortcut to view printable keystroke list.** Press <Shift><F7> to view and print the list of keystrokes assigned to actions, navigation keystrokes, and special-purpose keystrokes from any Connexion screen.

	<b>Action</b>
1	<ul style="list-style-type: none"><li>• On the Keystroke Shortcut Options screen, click <b>Print</b>.</li><li>Or</li><li>• From any Connexion screen, press &lt;Shift&gt;&lt;F7&gt;.</li></ul> The Keystroke Shortcuts List window opens.
2	In the Keystroke Shortcuts List window, <ul style="list-style-type: none"><li>• Click <b>Print</b> or press &lt;Ctrl&gt;&lt;P&gt;.</li></ul>

## 6 Overview of services and actions

### About the overview table

#### Notes:

- The General tab provides access to OCLC System News, user and session information, service-specific preferences (for services available to you), and interface customization options, regardless of the services available.
- The following table does not describe the Selection or Heritage Printed Book tabs. Your library must be profiled to use Selection, and only authorized CERL members can search or browse the HPB database, which is separate from WorldCat.
- The table lists services available to OCLC member libraries.

### Cataloging tab

Service Tab	Button or Menu Item	Result and Definition
Cataloging	<b>Search button</b>	Search WorldCat
	<b>Search Options</b> WorldCat Save File Bib Constant Data LH Constant Data	Search WorldCat, the bibliographic save file, or your institution's constant data (bibliographic or local holdings CD records).
	<b>Browse button</b>	Browse WorldCat (title phrase search)
	<b>Browse Options</b>	Browse WorldCat (title phrase search)
	<b>Create button</b>	Create a new bibliographic record by automatically extracting data from a web site or by selecting a workflow.
	<b>Create Options</b> Single Record	Create a new bibliographic record by automatically extracting data from a web site or by selecting a workflow.
	Multiple Records	Extract links from an HTML page and create initial bibliographic records.
	Import Records	Import MARC bibliographic records exported from WorldCat, provided by OCLC offline services, or created in another system.
	Bib Constant Data	Use MARC or Dublin Core format to create a constant data record that contains frequently used bibliographic information.

Service Tab	Button or Menu Item	Result and Definition
	LH Constant Data	Create a constant data record that contains frequently used local holdings information.
	<b>Show button</b>	List records flagged in the bibliographic save file.
	<b>Show Options</b>	
	Active Records	List bibliographic records currently open or being edited.
	By Status	Lists records (by status) in the bibliographic save file.
	Flagged SF Records	List records flagged in the bibliographic save file.
	Flagged CD Records	List records flagged in your library's bibliographic constant data database.
	Flagged LH CD Records	List records flagged in your library's local holdings constant data database.
	Default Bib CD	View and/or edit your default bibliographic constant data.
	Default LH CD	View and/or edit your default local holdings constant data.

**Authorities tab**

Service Tab	Button or Menu Item	Result and Definition
Authorities	<b>Search button</b>	Search the Connexion Authority File to find LC/ NACO name or subject authority records.
	<b>Search Options</b>	
	Authority File	Search the Connexion Authority File to find LC/ NACO name or subject authority records.
	Save File	Search the authority save file.
	Authority History	Retrieve all versions of an authority heading by searching a database of superseded authority records
	Constant Data	Search your institution's authority constant data.
	<b>Browse button</b>	Browse the Connexion Authority File to find LC/ NACO name or subject authority records.
	<b>Browse Options</b>	
	Authority File	Browse the Connexion Authority File to find LC/ NACO name or subject authority records.

Requirements, Access, Interface Map

Service Tab	Button or Menu Item	Result and Definition
	Authority History	Retrieve all versions of an authority heading by browsing a database of superseded authority records
	<b>Create button</b>	Create a new authority record by completing a workflow.
	<b>Create Options</b>	
	Authorities	Create a new authority record by completing a workflow.
	Import Records	Import MARC authority records exported from the Authority File or created in another system.
	Constant Data	Use MARC format to create a constant data record that contains frequently used information.
	<b>Show button</b>	Lists authority records (by status) in the Connexion Authority save file.
	<b>Show Options</b>	
	Active Records	List authority records currently open or being edited.
	By Status	Lists authority records (by status) in the Connexion Authority save file.
	Flagged AF Records	List authority records flagged in the Connexion Authority File.
	Flagged SF Records	List authority records flagged in the Connexion Authority save file.
	Default CD	View and/or edit your default authority constant data.
	Responded File	View authority records you submitted for review to which LC has responded (NACO users only)

Express tab  
(CatExpress)

Service Tab	Button or Menu Item	Result and Definition
Express	<b>Search</b>	Search WorldCat via CatExpress to retrieve records needed for copy cataloging.
	Basic	Basic search lets you retrieve records by standard number, title, or keywords.
	Advanced	Advanced search lets you combine search terms with Boolean operators, limit search results by date, format, or language, limit results to Internet resources only, and specify sorting of results.

Service Tab	Button or Menu Item	Result and Definition
	<b>Other</b>	Get CatExpress records and check online documentation.
	Download Export File	Download a session-specific file of OCLC-MARC bibliographic records. Records are added to the file as a result of your actions during a session. You must have record export added to your profile.
	Documentation	<p><b>Note: Non-subscribers using CatExpress</b> If you use CatExpress for a portion of your workflow, this activity is billed on a per-transaction basis, at the same rate as Connexion activity.</p> <p>Access the CatExpress User Guide on the OCLC web site.</p>

**Dewey Services tab**

When you click this tab, click the button for one of the following services:

- **Dewey** (full WebDewey) (requires a WebDewey subscription)

**Note:** This selection now opens the full WebDewey service **in standalone mode**. WebDewey is not described here because it now has separate user documentation. To open Help, in the full WebDewey screen:

Click **Help** in the navigation bar at the upper right.

**Note:** Your Connexion session remains open separately at the same time as the WebDewey session. You can log off Connexion without logging off WebDewey session. When ready to log off WebDewey, click **Logoff** in the navigation bar.

- **Abridged Dewey** (requires an Abridged WebDewey subscription)  
Opens the abridged version of Dewey from within the Connexion browser session.

**Note:** Abridged WebDewey is also in the process of becoming part of the independent, standalone Dewey service, separate from the Connexion browser.

The following description for Abridged WebDewey will apply while it remains within the browser application:

Service Tab	Button or Menu Item	Result and Definition
Dewey Services Abridged WebDewey	<b>Search button</b>	Search the pathfinder database.
	<b>Search Options</b>	

Service Tab	Button or Menu Item	Result and Definition
	Abridged WebDewey	Go to the Search Abridged WebDewey screen. Search the Abridged Dewey Decimal Classification.
	User Notes	Go to the Search Abridged WebDewey User Notes screen. Search your Dewey Notes database to check for notes that apply to your classification task.
	<b>Browse button</b>	Go to the Browse Abridged WebDewey screen.
	<b>Browse Options</b> Abridged WebDewey	Go to the Browse Abridged WebDewey screen. Browse the Abridged Dewey Decimal Classification.
	<b>Create button</b>	Go to a User Note workflow.
	<b>Create Options</b> User Notes	Go to a User Note workflow. Create notes that apply to specific DDC numbers, to types of material you catalog, or to library practices.
	<b>Show button</b>	Go to the Active Records screen.
	<b>Show Options</b> Active User Notes	Go to the Active Records screen. Find links to user note(s) you are currently viewing or editing.
	Introduction to the Abr. DDC	View the Introduction to the current edition of the Abridged Dewey Decimal Classification
	Glossary - Abr. DDC	View the Glossary for the current edition of the Abridged Dewey Decimal Classification
	Reloc. & Discontin. - Abr. DDC	View changes from the previous edition of the Abridged DDC
	Show Tables - Abr. DDC	View list of Abridged DDC Tables; jump to a specific table
	Start Dewey-Only	Appears when your current session is cataloging. Starts a new Dewey-Only session. <b>Available only with an OCLC cataloging authorization and a Dewey Services subscription.</b>
	Start Cataloging	Appears when your current session is Dewey-Only. Starts a new cataloging session. <b>Available only with an OCLC cataloging authorization and a Dewey Services subscription.</b>

**Pathfinders tab**

<b>Service Tab</b>	<b>Button or Menu Item</b>	<b>Result and Definition</b>
Pathfinders	<b>Search button</b>	Search the pathfinder database.
	<b>Search Options</b>	
	Pathfinders PF Save File Constant Data	Search the pathfinder database. Search the pathfinder save file. Search for pathfinder constant data records.
	<b>Browse button</b>	Browse the pathfinder database.
	<b>Browse Options</b>	
	Pathfinders	Browse the pathfinder database.
	<b>Create button</b>	Create a new pathfinder by automatically extracting bibliographic data from a web site or by completing a blank pathfinder template.
	<b>Create Options</b>	
	Pathfinder Constant Data	Create a new pathfinder by automatically extracting bibliographic data from a web site or by completing a blank pathfinder template. Create a pathfinder constant data record that contains frequently used content and/or formatting specifications.
	<b>Show button</b>	List saved pathfinders (by status) for your institution.
	<b>Show Options</b>	
	Active Pathfinders	List pathfinders currently being edited.
	By Status	List saved pathfinders (by status) for your institution.
	Flagged Pathfinders	List pathfinders currently flagged in the pathfinder database.
Flagged SF Records	List pathfinders currently flagged in the pathfinder save file.	
Default CD	View and/or edit your default pathfinder constant data.	

**General tab**

<b>Service Tab</b>	<b>Button or Menu Item</b>	<b>Result and Definition</b>
General	<b>News button</b>	Go to the Search News screen.
	<b>News Options</b> Search News	Go to the Search News screen. View OCLC announcements, news about products and services, release notes describing recent system updates, and information on planned system enhancements.
	<b>Admin button</b>	Go to the Preferences screen.
	<b>Admin Options</b> Preferences  User Information	Go to the Preferences screen. Customize the navigation bar and other system interface features. Change settings for the session inactivity timer. Set options for each service.  Go to the User Information screen. View session information for use when requesting support. Enter or change contact information (your name, e-mail address, and phone number).
	Extraction Shortcuts	Shortcuts for record creation. For use when you are not yet logged in to Connexion. To use a shortcut, you must add it to your browser toolbar.
	<b>Documentation button</b>	Go to a web page on the OCLC web site that lists Connexion documentation. Items listed are web-accessible files in PDF format. View the documentation online or print it for offline reference. The page also lists documentation on other OCLC cataloging services.

## 7 Help and technical support

### Context sensitive help

Action	
	At the top right corner of the screen, (between <b>Home</b> and <b>Contact</b> ), click <b>Help</b> . A Help window opens to display the help topic appropriate to the context.

### Search for a Help topic

	Action
1	At the top of any Help window, find the <b>Search Help</b> button and text box.
2	In the text box, type 1 or more words that indicate the concept or function you want help with. Then click <b>Search Help</b> .
3	The system searches the Help index and returns the results in the current Help window. The results window contains either: A list of topics that match the term(s) of your search. Or A message that your search matched no Help topics. The message includes tips for searching Help.
4	If you receive a list of topics, click the hyperlinked title of the topic you want to view. The topic appears in the Help window. If you receive the message ,WHPV IRXQG , retry the search. To improve results, enter fewer search terms or enter a synonym for your search term.

### Searching tips for Help

- When you search Help, you search an index of terms drawn from the topics (not the full text of the topics).
- The index contains: terms from the topic titles, terms from section headings within topics, and index terms assigned to each topic by the Help author.
- **Combine terms.** Type the terms, separated by spaces. A space is treated as a Boolean AND; the system retrieves only topics that match all the terms you enter. OR and NOT are not supported.
- **Right truncation.** To broaden a search, enter the beginning of a term, followed by the truncation symbol (an asterisk). **Example: extract\***
- **Wildcards not supported.** The Help search function does not support use of wildcard symbols, such as the question mark (?) or pound sign (#) to substitute for characters within a term.

**Get technical support via e-mail**

	<b>Action</b>
1	At the top right corner of the screen, click <b>Contact</b> . The Contact Support window appears.
2	Indicate the type of message you want to send. At the top of the window, under <b>Indicate the type of message</b> , select an option button: <ul style="list-style-type: none"> <li>• <b>Suggestion/Enhancement</b></li> <li>Or</li> <li>• <b>Problem/Question</b></li> </ul>
3	Indicate who should receive the message. Under <b>Choose a recipient for this message</b> , select the appropriate option button: <ul style="list-style-type: none"> <li>• Select <b>OCLC Support</b> to send the message to OCLC's Customer Support Department.</li> <li>Or</li> <li>• Select <b>Any E-mail Address</b> to send the message to an address you specify. In the text box, type a valid e-mail address. To send the message to more than one recipient, separate additional addresses with semicolons.</li> </ul>
4	Enter the message text. In the large text box, type a problem description, question, enhancement suggestion, or comment.
5	Provide contact information. <ul style="list-style-type: none"> <li>• In the box labeled <b>E-mail Address</b>, type your e-mail address.</li> <li>• In the box labeled <b>Contact Name</b>, type your name.</li> </ul> <b>Note:</b> You do not need to supply your e-mail address and name if you have already done so on the User Information screen. To view the User Information screen, on the General tab, under Admin Options, click <b>User Information</b> .
6	Accept telephone contact. At the option labeled <b>May support staff phone you about your message?</b> <ul style="list-style-type: none"> <li>• Leave the <b>Yes</b> button selected (recommended).</li> <li>Or</li> <li>• Select <b>No</b> if you prefer e-mail responses only.</li> </ul>
7	<b>(Optional)</b> Request a copy of the e-mail message. At the option labeled <b>Would you like a copy of this message?</b> <ul style="list-style-type: none"> <li>• Leave the <b>No</b> button selected (default setting).</li> <li>Or</li> <li>• Select <b>Yes</b> to receive a copy of the message.</li> </ul>
8	<b>(Optional)</b> Print message before sending To print the message <ul style="list-style-type: none"> <li>• Click the <b>Print</b> button at the top of the Contact Support window.</li> <li>Or</li> <li>• Press &lt;Ctrl&gt;&lt;P&gt;.</li> </ul>
9	<ul style="list-style-type: none"> <li>• Click <b>Send</b> to send the message.</li> <li>Or</li> <li>• Click <b>Cancel</b> to clear the message.</li> </ul>

**Tips on using the Contact Support e-mail form**

- **Contact Support form in secondary browser window.** When you click **Contact**, the form for composing and sending your message appears in a secondary browser window. The taskbar contains another item for this new instance of the browser software.
- **Use taskbar to return to unsent support request.** If you interrupt work on a message in the Contact Support window (for example, to switch to the Connexion window to verify your description of the problem), use the taskbar to return to the Contact window. Do **not** click the **Contact** link again; you may lose any text already entered in the Contact form.

**Explanation.** Most actions you take in Connexion cause the system to refresh the screen, including the header bar. If you click Contact on the redisplayed header bar, the system opens a new empty Contact form in the existing secondary window, overwriting any text you entered in the form.

- **Print form to save message text.** Click the **Print** button at the top of the Contact form or press <Ctrl><P>.

**Error messages**

- Error messages alert you when Connexion cannot complete a requested action.
- When possible, the message identifies the cause of the problem and, for problems that you can resolve, specifies a corrective action.
- Connexion error messages are **numbered** to help support staff trace the reported problem and identify the cause. Message numbers appear at the end of the message text, in parentheses.
- When requesting support via e-mail or phone, include error message numbers in your description of the problem.

**OCLC Customer Support Department contact information**

Topic	Information
Hours	7:00 am-9:00 pm US Eastern time, Monday through Friday
Telephone numbers	USA and Canada: 1-800-848-5800 International: +1-614-793-8682
Fax	1-614-764-2694
Web address	<a href="http://oclc.org/support/default.htm">http://oclc.org/support/default.htm</a>

## 8 View OCLC system news

### About News

#### What information is available in News?

- General news and announcements for users of all OCLC services.
- Announcements and news for users of OCLC Cataloging services.
- News and announcements about other services accessed via OCLC Connexion, such as pathfinders.
- In the **System Updates** category, provides information about the enhancements to OCLC Connexion and related web-based services. This News category replaces the link to version information formerly provided from the system home page.

#### How can I access News?

- On the General tab, click **News**.
- At the Search News screen, you can search News for all current items, for all items in a category.
- To find specific items of interest, you can search the **titles** or the **contents** of News items using keywords that specify your topic.

### View all News items

	Action
1	On the General tab, click <b>News</b> . The Search News screen appears.
2	In the search form, leave the <b>for</b> text box empty. Do not specify a News category.
3	Click <b>Search</b> or press <Enter>. The system displays a list of all current News items.

### View News by category

	Action
1	On the General tab, click <b>News</b> . The Search News screen appears.
2	In the search form, leave the <b>for</b> text box empty.

	Action
3	<p>Limit the search to a News category.                      In the <b>with Category</b> box, open the list and click the News category you want to retrieve.  <b>Default setting:</b> No category specified.</p> <p>News categories are:</p> <ul style="list-style-type: none"> <li>• Authorities</li> <li>• Cataloging</li> <li>• CatExpress</li> <li>• Digital Archive</li> <li>• Dublin Core</li> <li>• General</li> <li>• Local Holdings</li> <li>• Pathfinders</li> <li>• System Updates</li> <li>• WebDewey</li> </ul>
4	<p>Click <b>Search</b> or press &lt;Enter&gt;.                      The system displays a list of all current News items in the specified category.</p>

**Find specific News items**

	Action
1	<p>On the General tab, click <b>News</b>.                      The Search News screen appears.</p>
2	<p>Construct a search to specify the News item(s) you want to retrieve.</p> <ul style="list-style-type: none"> <li>• Type search term(s) in the <b>for</b> box. Spaces between words are treated as <b>and</b> operators; you can also combine terms with <b>or</b> and/or exclude terms with <b>not</b>.</li> <li>• Select the index to search from the list to the right of the <b>for</b> box. Click the arrow to open the list; then click <b>Title</b> or <b>Message</b>. <b>Title</b> is the default index.</li> <li>• Use truncation to expand a term to include variant endings. Or use truncation when you know only the first part of a term. Type the first characters of the term (include as many characters as you know); then type an asterisk (*). <b>Examples: search*, digi*, edit*</b></li> <li>• 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. <b>Examples: col?r</b> retrieves FRORU or FRORXU; <b>int?net</b> retrieves LQWHUQHW or LQWUDQHW. Use the number sign to retrieve variants of exactly 1 character. <b>Example: wom#n</b> retrieves both ZRPDQ and ZRPHQ.</li> </ul>

	Action
3	<p><b>(Optional)</b> Limit the search to a News category. In the <b>with Category</b> box, open the list and click the News category you want to retrieve. <b>Default setting:</b> No category specified.</p>
4	<p>Click <b>Search</b> or press &lt;Enter&gt;. The system displays the News item(s) that match the search criteria. <b>Clear text of News search</b></p> <ul style="list-style-type: none"> <li>• To clear the <b>Search for</b> text box, click <b>Clear Search</b>.</li> <li>• The index list retains the last index you selected.</li> <li>• The category list retains the last category you selected.</li> </ul>

**News search indexes**

Index (label)	Included Fields	Example	Tips/Why use?
Title (ti:)	Words in the titles of News items	<b>connexion</b>	Find a news item when you know the title or part of the title. Determine whether a term is part of the title of a current news item.
Message (me:)	Words in the content of news items	<b>cutter*</b>	Find occurrences of term(s) for the topic you want in the body of a news item.

**View News search results**

**Results display**

Number of Items Found	Results Display
<b>No News items found</b>	The system displays the following message at the top of the Search News screen: 1R 5HFRUGV )RXQG IRU <RXU 6HDUFG 3OHDVH FKDQJH RU VLPSOLI\ \RXU VHDFK DQG WU\ DJDLQ
<b>1 News item found</b>	The full News item appears.
<b>Up to 10 News items</b>	The system displays the message: >QXPEHU@ UHFRUGV IRXQG VHDFKQLQJ IRU >VHDFK TXHU\@ LQ 1HZV The results screen lists the title, category, and date for each retrieved news item. All results appear on the screen.

Number of Items Found	Results Display
11 or more News items	The system displays the message: >QXPEHU@ UHFRUGV IRXQG VHDFUFLQJ IRU >VHDFUK TXHU\@ LQ 1HZV <ul style="list-style-type: none"> <li>• The results screen lists the title, category, and date for each retrieved news item. The first 10 items appear on the screen.</li> <li>• The <b>View List</b> 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 <b>View Record</b> box lets you type an entry number to view the full record.</li> </ul>

**Query display**

At the top of the first screen of results, the system displays a message that includes the number of News items 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:

- Each term preceded by an index label identifying the index in which it was searched. **Example:** WL ¥FRQQH[LRQµ
- Term groups (multiple terms entered in the **for** box on the search form and searched in the same index). **Example:** PH GLJLWDO SUHVHUYDWLRQ
- For queries limited by category, the name of the specified category. **Example:** FD \*HQHUDO .

Use the displayed query to

- Diagnose causes for unsatisfactory search results.
- Refine your search to improve results.

**Sort retrieved News items**

	Action
1	Scroll to the top of the first screen of search results.
2	Open the Action list and select <b>Sort by Ascending Date</b> or <b>Sort by Descending Date</b> or <b>Sort by Category</b> or <b>Sort by Title</b> .

**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 <b>right arrow button</b> (right of <b>View List</b> box).
Move back 10 entries	Click the <b>left arrow button</b> (left of <b>View List</b> box).
View 10 entries beginning with specific entry	Type an entry number in the <b>View List</b> 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 <b>View Record</b> 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 <b>right arrow button</b> (right of <b>View Record</b> box).
View previous record in list	Click the <b>left arrow button</b> (left of <b>View Record</b> box).
View a specific record	Type an entry number in the <b>View Record</b> box and press <Enter>.
Return to search results	Click the <b>Search Results</b> button at the top or bottom of the record screen.

**Print screen of results**

	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 results list.
3	In your browser, on the File menu, click <b>Print</b> or on the toolbar click the <b>Print</b> button.
4	In the Print dialog box, click <b>OK</b> or press <Enter>.

**View a News item**

**Fields in News items**

<b>News item field</b>	<b>Description</b>
Date	The date that this News item became available.
Title	Brief description of the subject matter of the News item.
Category	Subject area for this News item.
Message	Content of the News item.

**Print News item**

	<b>Action</b>
1	Display the News item you want to print.
2	Click once in the frame that contains the News item.
3	In your browser, on the File menu, click <b>Print</b> or on the toolbar click the <b>Print</b> button.
4	In the Print dialog box, click <b>OK</b> or press <Enter>.