

Setup Worksheet for OCLC Connexion Browser

Purpose: To help you start using the browser interface to Connexion.

Description: List of basic settings to check, select, or enter before you use the Connexion browser for cataloging. Required settings are noted.

Directions:

- 1 In the second column, note your settings or other information (you may need to check settings in the program you currently use).
- 2 Follow directions in the third column to use the settings you recorded to set up the browser.

Reference: For more information, see the Connexion browser Help (after you log on, click **Help** in the header bar), or see Connexion documentation at < <http://www.oclc.org/support/documentation/connexion/browser/> >.

| Logon Setup | | |
|---|---|---|
| Setting to ... | Enter your information | Go to ... |
| Log on to Connexion | Authorization _____ (required) Password _____ (required) | Connexion Logon screen: 1 Point browser to: < http://connexion.oclc.org > General Access (most users) 2 Enter authorization and password |
| Set up automatic logon Or Enter up to 10 authorization/password combinations to select from a list at logon Or Enter authorization and password for Dewey-only access. | More authorization/passwords: Authorization _____ Password _____ Authorization _____ Password _____ Authorization _____ Password _____ Authorization _____ Password _____ | 1 On the Connexion Logon screen, click Local Browser Settings (link is below OCLC copyright information) 2 Enter more authorization/password combinations. 3 Enter a Name to identify each combination (Optional). 4 In the Dewey-Only column, type Y or N (Required). 5 Set a default authorization/password or select no default. 6 Dewey-Only access. For an authorization/password combination used to start a Dewey-Only session, type Y in the Dewey-Only column. |
| Export Setup | | |
| Setting to ... | Enter your information | Go to ... |
| Export records | --- | General tab > Admin > Export Options |
| Export to a file on your workstation | --- | ➤ On the Export Options screen, under Export Destination, select Export to a File |
| Export to TCP/IP connection Note: The Connexion browser does not support export via: • A communications or printer port • An OCLC Gateway connection (which displays messages back from your local system) | Host Name _____ (required) Port number _____ (required) | 1 Under Export Destination, select Export to a TCP/IP connection 2 Under TCP/IP Connection Options, supply host name of the computer that runs your local library system (example: name <i>lib.domain.edu</i> or numeric address <i>123.456.7.89</i>) and port number of the port that provides direct access to your local system Note: If your local system is protected by a firewall, configure the firewall software to accept data from any numeric IP address in the following range: 132.174.2.0/24 (all numeric addresses from 132.174.2.1 through 132.174.2.253). You must allow your local system to receive records from any IP address in this range. |
| Other TCP/IP settings | Logon ID _____ Password _____ Or User ID _____ | 1 Under TCP/IP Local System User Info, click to select the appropriate check box to Send Logon ID or Send User ID to your local system 2 Enter the logon ID/password or the user ID your local system requires for authentication |
| Export multiple flagged records (Pre-select export format) | ___ None (prompt for each export) ___ MARC ___ Dublin Core HTML ___ Dublin Core RDF | ➤ Under Flagged Bibliographic Record Export Format, click to select a format Note: Allows you to skip the step of selecting format each time you export (or keep the default, None). If format is not selected here, you must specify format each time you export |

| Labels Setup | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Setting to ... | Enter your information | Go to ... | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Print labels Connexion uses the OCLC Cataloging Label Program (V. 1.22 or higher) | Label Program installed? <input type="checkbox"/> Yes <input type="checkbox"/> No | <ol style="list-style-type: none"> 1 Label Program home page on OCLC Web site at < http://www.oclc.org/label/ > 2 Click Download Cataloging Label Program software | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Print single label (Using Label Program from within Connexion) | Label format: <input type="checkbox"/> SL4 <input type="checkbox"/> SLB <input type="checkbox"/> SL6 <input type="checkbox"/> SP1 | In the Connexion browser: General tab > Admin > Cataloging Options ➤ Under Label Format, select a format | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Print labels for groups of records downloaded and imported to the Label Program | Label format: <input type="checkbox"/> SL4 <input type="checkbox"/> SLB <input type="checkbox"/> SL6 <input type="checkbox"/> SP1 | In the Label Program: ➤ On the Options menu, click Format and then click the format you want | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Set print options in the Label Program | Printer: _____ Font type: _____ Font size: ____pt Form: <input type="checkbox"/> Continuous <input type="checkbox"/> Sheet Print offsets: <input type="checkbox"/> Top <input type="checkbox"/> Left | In the Label Program: ➤ On the Options menu, click Print Note: To print continuous labels in Windows NT (V. 4.0 or later), you must set up a custom label form to use with your pin-feed printer. For instructions, see documentation for the Label Program at < http://www.oclc.org/support/documentation/label/getting_started/#6 > | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Turn off Label Program prompt to save each label from Connexion | Leave prompt on: <input type="checkbox"/> Turn prompt off: <input type="checkbox"/> (If on, prompt appears whether or not you edited the label) | In the Label Program, to turn prompt off if you do not need to save the labels (for example, to print later in batch): ➤ On the Options menu, click Warn Before Closing Unsaved Label if check mark appears (check mark shows prompt is on) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Keystroke Shortcuts | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Setting to ... | Go to ... Enter your preferred assignments | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Customize keystroke shortcuts Note: Using these keystroke shortcuts is optional . These keystrokes work in supported versions of Netscape and Internet Explorer. You can customize by reassigning your most-used actions to keys you find most convenient. Permanent keystrokes. Connexion browser provides permanently assigned keystrokes for actions you can take on a bibliographic or authority record. To view permanent keystrokes for available actions, on a record screen press <Alt><K>. Permanent command keystrokes work with supported versions of Internet Explorer only . | General tab > Admin > General Options > Keystroke Shortcut Options ➤ Use or reassign any of the following 18 keystroke combinations to any Connexion browser actions or functions. To view all assignable actions and functions, on the Preferences/Keystroke Shortcut Options screen, scroll one of the lists next to a key assignment Browser keystrokes and default assignments: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Available Keystrokes</th> <th style="text-align: left;">Your Preferred Assignment ...</th> <th style="text-align: left;">Default Assignment</th> </tr> </thead> <tbody> <tr><td><Ctrl><Shift><A></td><td>_____</td><td>Replace Record</td></tr> <tr><td><Ctrl><Shift><C></td><td>_____</td><td>Apply Default Constant Data</td></tr> <tr><td><Ctrl><Shift><D></td><td>_____</td><td>Derive New Record</td></tr> <tr><td><Ctrl><Shift><E></td><td>_____</td><td>Export Record in MARC</td></tr> <tr><td><Ctrl><Shift><F></td><td>_____</td><td>Flag Record</td></tr> <tr><td><Ctrl><Shift><G></td><td>_____</td><td>Set as Default Constant Data</td></tr> <tr><td><Ctrl><Shift><H></td><td>_____</td><td>Display Holdings</td></tr> <tr><td><Ctrl><Shift><K></td><td>_____</td><td>Control All Headings and DDC</td></tr> <tr><td><Ctrl><Shift><L></td><td>_____</td><td>Edit Record</td></tr> <tr><td><Ctrl><Shift><M></td><td>_____</td><td>Lock Master Record</td></tr> <tr><td><Ctrl><Shift><P></td><td>_____</td><td>Produce and Update Holdings</td></tr> <tr><td><Ctrl><Shift><Q></td><td>_____</td><td>Release Record Lock</td></tr> <tr><td><Ctrl><Shift><R></td><td>_____</td><td>Reformat Record</td></tr> <tr><td><Ctrl><Shift><S></td><td>_____</td><td>Save Record</td></tr> <tr><td><Ctrl><Shift><U></td><td>_____</td><td>Update Holdings</td></tr> <tr><td><Ctrl><Shift><V></td><td>_____</td><td>Validate Record</td></tr> <tr><td><Ctrl><Shift><X></td><td>_____</td><td>Delete Save File Record</td></tr> <tr><td><Ctrl><Shift><Z></td><td>_____</td><td>Unedit Record</td></tr> </tbody> </table> | | Available Keystrokes | Your Preferred Assignment ... | Default Assignment | <Ctrl><Shift><A> | _____ | Replace Record | <Ctrl><Shift><C> | _____ | Apply Default Constant Data | <Ctrl><Shift><D> | _____ | Derive New Record | <Ctrl><Shift><E> | _____ | Export Record in MARC | <Ctrl><Shift><F> | _____ | Flag Record | <Ctrl><Shift><G> | _____ | Set as Default Constant Data | <Ctrl><Shift><H> | _____ | Display Holdings | <Ctrl><Shift><K> | _____ | Control All Headings and DDC | <Ctrl><Shift><L> | _____ | Edit Record | <Ctrl><Shift><M> | _____ | Lock Master Record | <Ctrl><Shift><P> | _____ | Produce and Update Holdings | <Ctrl><Shift><Q> | _____ | Release Record Lock | <Ctrl><Shift><R> | _____ | Reformat Record | <Ctrl><Shift><S> | _____ | Save Record | <Ctrl><Shift><U> | _____ | Update Holdings | <Ctrl><Shift><V> | _____ | Validate Record | <Ctrl><Shift><X> | _____ | Delete Save File Record | <Ctrl><Shift><Z> | _____ | Unedit Record |
| Available Keystrokes | Your Preferred Assignment ... | Default Assignment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><A> | _____ | Replace Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><C> | _____ | Apply Default Constant Data | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><D> | _____ | Derive New Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><E> | _____ | Export Record in MARC | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><F> | _____ | Flag Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><G> | _____ | Set as Default Constant Data | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><H> | _____ | Display Holdings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><K> | _____ | Control All Headings and DDC | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><L> | _____ | Edit Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><M> | _____ | Lock Master Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><P> | _____ | Produce and Update Holdings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><Q> | _____ | Release Record Lock | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><R> | _____ | Reformat Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><S> | _____ | Save Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><U> | _____ | Update Holdings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><V> | _____ | Validate Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><X> | _____ | Delete Save File Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <Ctrl><Shift><Z> | _____ | Unedit Record | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Print a list of keystroke shortcuts for reference | <ol style="list-style-type: none"> 1 At the top or bottom of the Keystroke Shortcut Options screen, click Print. Or, on any screen, press <Shift><F7>. The list includes the keystrokes above and many more nonchangeable keystroke shortcuts you can use for searching and browsing, navigating, record action commands, and other special purposes such as entering diacritics. 2 In the Keystroke Shortcuts List popup window, click Print to confirm. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |