Set Options and Customize Keyboard Shortcuts

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Revision History

Date	Section title	Description of changes
April 2012	1. Set preferences 7. Cataloging options	Added options for using RDA workforms Added options for using prototype OCLC Classify service
August 2006	1. Set Preferences;2. Customize interface; 3. Keystrokes; 4. User information	Minor updates.
	13. CatExpress options	Minor revisions to reflect recent enhancements.
November 2006	3. Keystrokes;	Minor update to add new keystrokes.
	10. Export options	Added new option to delete fields on export for bibliographic and authority records.
	15. CatExpress options	Added new topic to explain new export options for CatExpress users. Users can specify a neme and file type for export files and also specify fields to delete on export for bibliographic records.
December 2006	4. User information	Minor update to add authorization level for the WorldCat Selection service.
May 2007	4. User information; 5. Cataloging options; 10. Export options	Added information about options related to new support for using institution records attached to master bibliographic records.
February 2012	2. Customize the interface 3. Keystrokes 5. Cataloging options	Removed “and DDC” from “Control All” command. Connexion no longer controls DDC numbers. Added a note that Connexion does not hyperlink the OCLC number of cited records in fields 800, 810, 811, or 830.

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1 Set preferences

Open the Preferences screen
Use the Preferences screen

Open the Preferences screen

Action
On the General tab • Click **Admin**. • Or, under Admin Options, click **Preferences**.

Use the Preferences screen

The Preferences screen lists several categories of options that apply to the OCLC Connexion interface, to a specific service, or to a specific system function (such as exporting records).

Your authorization and/or your subscription(s) to services determine which option categories are available.

- Click **General Options** to show or hide tabs for Connexion services, change settings for the session timer, or reassign shortcut keys.
- Click **Cataloging Options** to specify default views for bibliographic records or control display of web resources you are cataloging.
- Click **Local Holdings Options** to supply default text to appear in the My Status field of local holdings constant data records.
- Click **Authority Options** to select default views for authority records or to specify the display of authority records linked to controlled headings in bibliographic records.
- Click **Export Options** to go to a screen you use to set your default export method and (if using TCP/IP export to a local system) to enter information required for that method.
- Click **Pathfinder Options** to select default views for editing pathfinders or to customize the pathfinder outline view.
- Click **Dewey Services Options** to customize display of certain components in WebDewey (or Abridged WebDewey) records and to determine the visibility of Dewey user notes.
- Click **Express Options** to customize viewing and editing bibliographic records in CatExpress.
- Click **Heritage Printed Book Options** to customize viewing, editing, creating, and taking action on bibliographic records in the Heritage Printed Book database.

- Click **RDA Options** to:
  - —Use RDA workforms to create bibliographic and/or authority records (instead of the default workforms based on AACR2).

    Select one or both check boxes under **Bibliographic Workforms** and **Authority Workforms**.
  - —Enable access to field-specific cataloging guidelines in the online RDA Toolkit

    Note: You must be a subscriber to use the RDA Toolkit field descriptions.
    - On the RDA Options screen, click to select the **Enable RDA Toolkit** check box.
    - Select either the **Use IP authentication** check box or type your RDA Toolkit username and password in the appropriate text boxes.
    - Connexion uses the information you enter to log on to the RDA Toolkit.

  Click **Save My Default** to save your entries.

2 Customize the system interface

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. Most interface customization options for Connexion apply to CatExpress.

However, some options relate to advanced cataloging functions of Connexion that are not available to CatExpress subscribers.

Go to Interface Customization screen

	Action
1	On the General tab, under Admin Options, click **Preferences**.
2	At the Preferences screen, click **General Options**.
3	On the General Options screen, click **Interface Customization Options**.

Save changes, cancel, or restore original defaults

When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

Show or hide tabs for Connexion services

	Action
1	On the Interface Customization screen, find the section labeled **Select Service Tabs for Navigation Bar**. • This section lists all Connexion services available to you based on your authorization and on your subscriptions to additional services. • A check box appears before each service name. **Default setting:** All available services are selected (check marks appear in all check boxes).
2	**Show or hide tabs for services** • **Show a hidden tab.** Click the empty check box in front of the service name. A check mark appears in the box. • **Hide a visible tab.** Click the check box in front of the service name. The check mark disappears.
3	Save changes as default or use for current session only.

Show or hide specific options on a tab

	Action
1	On the Interface Customization screen, find the section labeled **Select Service Tabs for Navigation Bar**. This section lists all Connexion services available to you based on your authorization and on your subscriptions to additional services.
2	To select specific options, Options lists, or buttons to show or hide on a tab, in the list of service tabs, Click the **hyperlinked service name** for the tab you want to customize. The system displays a screen that lists available options and lets you specify exactly which options appear on the tab. **Note: Service name not hyperlinked** If a service name is not hyperlinked, option selection is not yet available for that service tab.

Add a scroll bar to the navigation bar

	Action
1	**Scroll Bar** On the Interface Customization screen, find the section labeled **Scroll Bar on Navigation Bar**. Select the appropriate option button. • Click **Display If Needed** to add a horizontal scroll bar to the navigation bar only if required due to changes in screen size or resolution. • Click **Always Display** to provide a horizontal scroll bar at all times. **Default setting:** Display If Needed. **Note:** Adding a scroll bar removes the **More** tab from the navigation bar.
2	Save changes as default or use for current session only.

Use optimized images in Connexion interface

- The Optimize Images setting lets you determine whether Connexion displays interface elements as standard **.gif** images or as pixel-mapping tables that resemble images. In most cases, using pixel-mapping tables allows the browser to display screens faster, improving system response time.
- Keep the default setting (**On**) for better browser performance when using Connexion.
- Select the **Off** setting **only** if browsing is consistently slower when optimization is turned on. Before turning optimization off, contact OCLC Customer Support for assistance in diagnosing performance problems.

Notes:

- Image optimization works with supported Windows versions of Internet Explorer. This functionality is **not available** for Netscape browsers or on an Apple Macintosh computer.
- If you select **Large Tab Images** to enlarge the navigation bar, optimized images are not used.

Enlarge tabs and text on the navigation bar

	Action
1	**Large tab images and text** On the Interface Customization screen, find the section labeled **Size of Tab Images and Text in Navigation Bar**. Select the appropriate option button. • Click **Large Tab Images** to use tabs and text larger than those the system automatically provides. • Click **Standard Tab Images** to use standard tab and text sizes for your screen resolution. **Default setting:** Default Tab Images. The system automatically sizes the navigation bar based on screen resolution.
2	Save changes as default or use for current session only.

Add a Go button to the navigation bar

Purpose. Add a Go button to provide a keyboard-only method of navigating via the Options lists.

How it works

- **With Go button.** When the navigation bar includes a Go button, navigating via Options lists requires 2 steps. First, select the list item. Then use the Go button to complete the selected action.
- **Without Go button.** With the Go button hidden (the default setting), when you select a list item, the system does the selected action immediately.

	Action
1	On the Interface Customization screen, find the section labeled **Show or Hide Go Button**.
2	Select the appropriate option button. • Click **Show** to add a Go button to the right of the Options lists on the active tab. • Click **Hide** to display the Options lists without a Go button. **Default setting:** Hide. Go button does not appear on the navigation bar.
3	Save changes as default or use for current session only.

Use the Go button with Options lists

Go button off. If you did not add a **Go** button,

- **Keyboard.** Press the shortcut key for the Options list (see table). Then press <down-arrow> once to select the first item on the list.
- **Note:** Without a Go button, you cannot use the keyboard to select any item on the Options list; only the first item is accessible.
- **Mouse.** Open the list, point to the item you want, and click once to select the item.

Go button on. If you added a **Go** button,

- **Keyboard.** Press the shortcut key for the Options list (see table). Then press <down-arrow> one or more times to select the item you want. Then press <Enter> to take action (if you have not moved the cursor from the Options list). Or press <Alt><8> to take action (if you moved the cursor to a position in the lower frame of the screen.
- **Mouse.** Open the Options list, point to the item you want, and click to select the item. Then click **Go**.

Options list (on active tab)	Keystroke
Search Options	<Alt><!>
Browse Options **Not on Express tab** Or Admin Options on General tab	<Alt><@>
Create Options **Not on Express tab**	<Alt><#>
Show Options **Not on Express tab**	<Alt><$>
Other Options **Express tab only**	<Alt><%>

Show or hide OK/ Cancel prompts for record actions

- This option applies to selected actions for bibliographic records and authority records.
- Your setting for this option does not affect some actions, which always require you to respond to an OK/Cancel prompt. These actions include: Delete Constant Data Record, Delete Save File Record, Delete Holdings, and Report Error.

	Action
1	On the Interface Customization screen, find the section labeled **Show or Hide OK/Cancel Messages**.
2	For **Final Actions** and **Editing Actions**, select the appropriate option button. • Click **Yes** to have Connexion prompt you to approve or cancel before executing requested actions. • Click **No** to have Connexion execute requested actions without prompting you for an **OK** or **Cancel** response. • Final actions included: — Produce and Update Holdings — Replace and Update Holdings — Replace Record (bibliographic records only) — Submit to Nat'l Review File — Update holdings • Editing actions included: — Cancel Changes — Control All Headings — Derive New Constant Data Record — Derive New Record — Lock Master Record — Release Record Lock — Set as Default Constant Data — Unedit Record **Default setting:** Yes for both options. Before executing final actions and editing actions, Connexion prompts you to respond with **OK** to proceed or **Cancel** to cancel the action.
3	Save changes as default or use for current session only.

Show or hide logoff warning for active records

	Action
1	On the Interface Customization screen, find the section labeled **Show or Hide Logoff Warning**.
2	Select the appropriate option button. • Click **Show** to have the system warn you, before ending your session, that records remain open in edit mode. • Click **Hide** to prevent the system from displaying the logoff warning for records in edit mode. **Default setting:** Hide. The system ends the session immediately. The system does not check for active records. No warning screen appears.
3	Save changes as default or use for current session only.

Show or hide quick tips

	Action
1	On the Interface Customization screen, find the section labeled **Show or Hide Quick Tips**.
2	Select the appropriate option button. • Click **Show** to see all available tips on all Connexion screens. • Click **Hide** to hide all tips on all Connexion screens. **Default setting:** Show. Any available tips appear on all Connexion screens.
3	Save changes as default or use for current session only.

View diacritics and special characters while editing

- **Option applies to edit views only.** In display views, Connexion always displays the typographic forms of diacritics and special characters.
- **CatExpress users** should accept the default setting.

	Action
1	On the Interface Customization screen, find the section labeled **Diacritics and Special Characters in Edit View**.
2	Select the appropriate option button. • Click **Display Diacritic or Character** to see the correct typographic forms of diacritics and special characters. • Click **Display Bar Syntax** to view the bar syntax representations for diacritics and special characters in the ALA character set. **Default setting:** Display Diacritic or Character.
3	Save changes as default or use for current session only.

Set options for the session inactivity timer

	Action
1	On the Interface Customization screen, find the section labeled **Session Timer Options**.
2	**Specify minutes of inactivity before automatic logoff**. At the option labeled **Inactivity Countdown Timer**, open the list and select the number of minutes you want. You can specify from 10 to 40 minutes, in 1-minute increments. **Default setting:** 40 minutes. The system automatically ends a session after 40 minutes of inactivity. **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.

<table>
<tr><th></th><th>Action</th></tr>
<tr><td>3</td><td>Display of countdown timer
At the option labeled Inactivity Countdown Timer, select the appropriate option button.
Click Display in Header Bar to place the digital countdown timer on the header bar above the navigation bar.
Click Display in Status Bar to place the digital countdown timer on the status bar at the bottom border of the browser window.
Click Hide to hide the digital countdown timer.
Default setting: Display in Status Bar. The countdown timer appears on the status bar at the bottom border of the browser window.</td></tr>
<tr><td>4</td><td>Timeout warning
At the option labeled Timeout Warning, set the following items:
Specify when to display a timeout warning.
From the list, select how many minutes in advance of automatic logoff you want to see a warning message. You can specify from 1 minute to 9 minutes, in 1-minute increments.
Default setting: 5 minutes.
Control whether, and where, the timeout warning appears.
Select the appropriate option button.
Click Do Not Display to turn off the timeout warning.
Click Display in Navigation Bar Area to have the system present a timeout warning message in the navigation bar.
Click Display in Popup Window to have the system display a timeout warning message in a separate window on top of other open windows.
Default setting: Display in Navigation Bar Area. The timeout warning appears in the navigation bar.</td></tr>
<tr><td>5</td><td>Specify what happens when session timeout occurs.
At the option labeled When Timer Expires, select the appropriate option button.
Click Display Logoff Screen to have the system display the logoff screen that 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.
Click Keep Current Display to have the system end the session at the screen you last used. This can help you resume work efficiently. However, if you select this option, you will not see the logoff screen that reports your session duration.
Note: The system cannot retain the current display after logoff if you specify a timeout interval under 40 minutes (when the server ends an inactive session). To end a session after a shorter inactive period, the system uses a logoff command, which always displays the logoff screen.</td></tr>
<tr><td>6</td><td>Save changes as default or use for current session only.</td></tr>
</table>

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.

  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.

Automatic logoff on browser close

- This option controls the Connexion function that automatically ends a session when you close your browser.
- After automatic logoff, you incur no access and support charges for the session, and the session does not count against simultaneous logon limits if you subscribe to Flat Fee Internet access or Dedicated TCP/IP access.
- Keep the default setting for this option unless it causes a problem.
- Before changing the setting, contact OCLC Customer Support for assistance. CSD staff can verify that automatic logoff functionality is causing the problem you have and, if necessary, help you select the best automatic logoff setting for your workstation, operating system, and browser configuration.

	Action
1	**Automatic logoff option** On the Interface Customization screen, find the section labeled **Automatic Session Logoff on Browser Close**. **Keep the default setting** • **On - Use default method for your browser.** With the default setting selected, your Connexion session is logged off automatically when you close your browser. • After automatic logoff, you incur no access and support charges for the session, and the session does not count against simultaneous logon limits if you subscribe to Flat Fee Internet access or Dedicated TCP/IP access. **Change setting** OCLC recommends that you use the default setting unless you are advised to change it by Customer Support staff. • Select **Off - Do not log off when browser window is closed** if you do not want your Connexion session logged off automatically when you close the browser. • Select **Always use session monitor window** if your session remains active after you close the browser window, indicating that the default automatic logoff method does not work for your browser. With this option, a small session monitor window opens in the background when you log on. The window detects when you close the main browser window, resulting in automatic logoff.
2	Save changes as default or use for current session only.

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 or Dedicated TCP/IP access. You (or others from your institution) may be unable to log in again until an inactivity timeout ends the “lost” session.
- OCLC Customer Support staff can end the active session.

Change background color

If you find the default white background of interface screens uncomfortably bright, you can choose a light blue background.

	Action
1	On the Interface Customization screen, find the section labeled **Background Color**.
2	Select the appropriate option button. • Click **Light Blue** to use a light blue background on Connexion screens. • Click **White** to use the default white background. **Default setting:** White.
3	Save changes as default or use for current session only.

Related topics

3 Keystrokes for record actions and navigation

Command shortcuts: permanent keystrokes for actions

- Connexion browser provides permanently assigned keystrokes for actions you can take on a bibliographic or authority record.
- The Command Shortcuts list includes a keystroke for every command that appears on the Edit, Action, and View lists.
- Use these keystrokes instead of
  - —Selecting a command from the Edit, Action, or View list.
  - —Using a customizable shortcut for the command. Note: Customizable keystrokes work in both IE and Netscape but are limited in number. For information on using these keystrokes, see the sections titled “Change the action assigned to a keystroke” and “Keystrokes and default actions” in this topic.
- Command Shortcuts are available with supported versions of Internet Explorer only.

Action	How To
Show the Command Shortcuts box above the record header	Press <Alt><K>.
Hide the Command Shortcuts box; show the Edit, Action, and View lists	Press <Alt><J>.
Show or hide the scrollbar in the Command Shortcuts box. Showing the scrollbar reduces the size of the box.	Click **Show/Hide Command Scrollbar**. Or Press <Alt><K> and then <|> (<Shift><\>).
Use a command shortcut when the Command Shortcuts box is visible. Or show the box and use a shortcut.	Press and release <Alt><K> and then press the shortcut key for the command. Or In the Command Shortcuts box, click the command you want to use.
Use a command shortcut when the Command Shortcuts box is hidden. Do not show the box; keep the Edit, Action, and View lists visible.	Press and release <Alt><J> and then press the shortcut key for the command.

Table of command shortcuts

Action	Keystroke
Add Record	<Alt><K> and then <N>
Alternate Produce and Update	<Alt><K> and then <1>
Apply CD By Name	<Alt><K> and then <5>
Apply CD From List	<Alt><K> and then <6>
Apply Default CD	<Alt><K> and then <C>

Action	Keystroke
Back to Editing	<Alt><K> and then <L>
Cancel Changes	<Alt><K> and then <2>
Control All Headings	<Alt><K> and then <K>
Create Local Holdings	<Alt><K> and then <+> (plus sign)
DC HTML Preview	<Alt><K> and then <%> (<Shift><5>)
DC RDF Preview	<Alt><K> and then <^> (<Shift><6>)
DC Template	<Alt><K> and then <$> (<Shift><3>)
DC Text Area	<Alt><K> and then <&> (<Shift><7>)
Delete Constant Data Record	<Alt><K> and then <X>
Delete All Local Holdings	<Alt><K> and then <-> (hyphen)
Delete Holdings	<Alt><K> and then <9>
Delete Local Holdings	<Alt><K> and then <X>
Delete Save File Record	<Alt><K> and then <X>
Derive New Constant Data Record	<Alt><K> and then <4>
Derive New Record	<Alt><K> and then <D>
Display Constant Data Record	<Alt><K> and then <T>
Display Find in a Library	<Alt><K> and then <8>
Display Local Holdings	<Alt><K> and then <\> (backslash)
Display Holdings	<Alt><K> and then <H>
Display Record	<Alt><K> and then <T>
Edit Constant Data record	<Alt><K> and then <L>
Edit Local Holdings	<Alt><K> and then <_> (underscore)
Edit Record	<Alt><K> and then <L>
Export Record in DC HTML	<Alt><K> and then <*> (<Shift><8>)
Export Record in DC RDF	<Alt><K> and then <(> (<Shift><9>)
Export Record in MARC	<Alt><K> and then <E>
Flag Record	<Alt><K> and then <F>
Lock Master Record	<Alt><K> and then <M>
MARC Template	<Alt><K> and then <[>
MARC Text Area	<Alt><K> and then <]>
Mark For Export	<Alt><K> and then <J>
Mark For Label	<Alt><K> and then <3>
Print Record	<Alt><K> and then <I>
Produce and Update Holdings	<Alt><K> and then <P>
Recall Submitted Record	<Alt><K> and then <<> (left angle bracket)

<table>
<tr><th>Action</th><th>Keystroke</th></tr>
<tr><td>Reformat Record</td><td><Alt><K> and then <R></td></tr>
<tr><td>Release Record Lock</td><td><Alt><K> and then <W></td></tr>
<tr><td>Replace and Update Holdings</td><td><Alt><K> and then <N></td></tr>
<tr><td>Replace Record</td><td><Alt><K> and then <A></td></tr>
<tr><td>Report Error</td><td><Alt><K> and then <7></td></tr>
<tr><td>Save Constant Data Record</td><td><Alt><K> and then <S></td></tr>
<tr><td>Save Record</td><td><Alt><K> and then <S></td></tr>
<tr><td>Set as Default Constant Data</td><td><Alt><K> and then <G></td></tr>
<tr><td>Show Command Lists (when Command Shortcuts box is visible)</td><td><Alt><J>
Or
<Alt><K> and then <B></td></tr>
<tr><td>Show/Hide Command Scrollbar</td><td><Alt><K> and then <|> (<Shift><\>)</td></tr>
<tr><td>Show Command Shortcuts (when Edit, Action, and View lists are visible)</td><td><Alt><K></td></tr>
<tr><td>Show/Hide Functions List</td><td><Alt><Y>
Or
<Alt><K> and then <=></td></tr>
<tr><td>Show/Hide Quick Search</td><td><Alt><Q>
or
<Alt><K> and then <Q></td></tr>
<tr><td>Submit for Review</td><td><Alt><K> and then <>> (right angle bracket)</td></tr>
<tr><td>Unedit Record</td><td><Alt><K> and then <Z></td></tr>
<tr><td>Unflag Record</td><td><Alt><K> and then <F></td></tr>
<tr><td>Update Holdings</td><td><Alt><K> and then <U></td></tr>
<tr><td>Validate Record</td><td><Alt><K> and then <V></td></tr>
<tr><td>View Authority History Record(s)</td><td><Alt><K> and then <H></td></tr>
<tr><td>View Authority Record</td><td><Alt><K> and then <A></td></tr>
<tr><td>View Label in Label Program</td><td><Alt><K> and then <Y></td></tr>
<tr><td>View Group Summary</td><td><Alt><K> and then <G></td></tr>
</table>

Customizable keystrokes for actions (<Ctrl><Shift> keystrokes)

- Connexion browser provides a limited set of customizable keystrokes that work in supported versions of Internet Explorer and Netscape.
- Keystrokes apply only to bibliographic records and authority records. The keystrokes are not available for other records (such as pathfinders or) or when using other Connexion services (for example, Express, WebDewey, Digital Archive).
- The keyboard shortcut for an action works only if

—The action is supported in the current mode (master edit, local edit, or display).

And

—You are authorized to take the action.

- The Action, Edit, and View lists (above the record view) show available actions for your current mode and authorization level.
- Sometimes a keystroke does not work because the record view is not the active frame (screen area). If a keystroke should work (the action is available and you are authorized) but does not, click the mouse once within the record to make it the active frame. Then repeat the keystroke.

Why customize keystrokes?

- Many users find that they work more efficiently, especially while editing, if they avoid switching between the keyboard and the mouse.
- Customizing the default keystrokes lets you assign your most-used actions to the keys you find most convenient.

Change the action assigned to a keystroke

- You may find that the actions assigned to keystrokes are not your most-used actions. You can assign other actions that better fit your workflow.
- **Deactivate a keystroke.** You can select the [No Action] option for any keystroke to make that keystroke inactive in Connexion. Select this option to prevent conflicts with keystrokes used by other software that is active while you use Connexion.

	Action
1	On the General tab, under Admin Options, click **Preferences**.
2	At the Preferences screen, click **General Options**.
3	On the General Options screen, click **Keystroke Shortcut Options**. The Keystroke Shortcut Options screen appears.
4	To change the action assigned to a keystroke, Find the key combination you want to use in the list of default keystrokes. Open the list of available actions. Click the action you want to assign to the keystroke.
5	Review the modified key assignments. Make sure you have not assigned the same action to more than one key combination.
6	Save changes as default or use for current session only. • Click **Save My Default** or **Save for Session**.

Keystrokes and default actions

Action	Keystroke
Replace Record	<Ctrl><Shift><A>
Apply Default CD	<Ctrl><Shift><C>
Derive New Record	<Ctrl><Shift><D>
Export Record in MARC	<Ctrl><Shift><E>
Flag Record	<Ctrl><Shift><F>
Set as Default Constant Data	<Ctrl><Shift><G>

Action	Keystroke
Display Holdings	<Ctrl><Shift><H>
Control All Headings	<Ctrl><Shift><K>
Edit Record	<Ctrl><Shift><L>
Lock Master Record	<Ctrl><Shift><M>
Produce and Update Holdings	<Ctrl><Shift><P>
Release Record Lock	<Ctrl><Shift><Q>
Reformat Record	<Ctrl><Shift><R>
Save Record	<Ctrl><Shift><S>
Update Holdings	<Ctrl><Shift><U>
Validate Record	<Ctrl><Shift><V>
Delete Save File Record	<Ctrl><Shift><X>
Unedit Record	<Ctrl><Shift><Z>

Actions you can assign to keystrokes

- You may find that the actions assigned to keystrokes are not your most-used actions. You can assign other actions that better fit your workflow.
- You can assign any of the following actions to default keystrokes.
- The notation (Default) indicates which actions are assigned to keystrokes in the OCLC-supplied default settings.

Other actions you can assign to keystrokes
Add Delimiter
[No Action] (Make keystroke inactive)
Alternate Produce and Update
Apply CD By Name
Apply CD From List
Apply Default CD **(Default)**
Cancel Changes
Control All Headings **(Default)**
Check URL Status
DC HTML Preview
DC RDF Preview
DC Template
DC Text Area
Delete Holdings
Delete Save File Record **(Default)**
Derive New Record **(Default)**
Display Holdings **(Default)**

Other actions you can assign to keystrokes
Display Record
Edit Record **(Default)**
Export Record in DC HTML
Export Record in DC RDF
Export Record in MARC **(Default)**
Flag Record **(Default)**
Lock Master Record **(Default)**
MARC Template
MARC Text Area
Mark for Export
Mark for Label
Produce and Update Holdings **(Default)**
Reformat Record **(Default)**
Release Record Lock **(Default)**
Replace and Update Holdings
Replace Record **(Default)**
Report Error
Save Record **(Default)**
Scroll to Bottom
Scroll to Top
Set as Default Constant Data
Submit Record to Natl Review File
Unedit Record **(Default)**
Unflag Record
Update Holdings **(Default)**
Validate Record **(Default)**
View Label in Label Program

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	<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>
Start new cataloging session from a Dewey-Only session	<Alt><N>

Navigation bar keystrokes

- You can use tabs, buttons, and Options lists on the navigation via keyboard only.
- You cannot reassign these keystrokes for other purposes.
- 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
Header bar -- select an action	
Home	<Alt><O>
Help	<Alt><H>
Contact (Support)	<Alt><S>
Diacritics	<Alt><,> (comma)
Logoff	<Alt><L>
Tabs -- select a tab (if it is visible on screen)	
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>
Buttons -- select a button (on active tab)	
Search Or News on General tab	<Alt><1>
Browse Or Admin on General tab	<Alt><2>
Create Or Documentation on General tab	<Alt><3>
Show	<Alt><4>

Purpose	Keystroke
Options lists -- select list (on active tab) **Go button off.** If you did not add a Go button to the navigation bar, • Press the shortcut key for the Options list. • Then press <down-arrow> once to select first item on the list. **Go button on.** If you added a **Go** button to the navigation bar, • Press the shortcut key for the Options list. • Then press <down-arrow> to select an option. • Then press <Enter> to take action (if you have not moved the cursor from the Options list). • Or press <Alt><8> to take action (if you moved the cursor to a position in the lower frame of the screen).	
Search Options	<Alt><!>
Browse Options Or Admin Options on General tab	<Alt><@>
Create Options	<Alt><#>
Show Options	<Alt><$>
Other Options Express tab only	
Bypass navigation bar **Note:** 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>
Switch between navigation bar and main frame (record or dialog box)	
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)

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>

To	Press these keys
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.

	Action
1	• On the Keystroke Shortcut Options screen, click **Print**. Or • From any Connexion screen, press <Shift><F7>. The Keystroke Shortcuts List window opens.
2	In the Keystroke Shortcuts List window, • Click **Print** or press <Ctrl><P>.

4 View or change user information

How to use this screen

- Update contact information (name, e-mail address, and phone number) for use by support staff.
- Review information about your authorization and your current session.

Information for technical support

- The User Information screen presents data that can assist support staff in diagnosing and resolving problems that you report. When requesting telephone support, you may be asked to refer to this screen to provide information.
- **Note:** If you request support via e-mail using the **Contact** link at the top right corner of the screen, the system collects this information automatically and sends the data with your message.

Information for error reporting

- When you notify OCLC of an error in a record by taking the **Report Error** action on a bibliographic or authority record, the system supplies contact information you entered on the User Information screen. You can edit the information before sending the error report.
- if you have not entered your name and e-mail address in User Information, you must type the information in the Report Error dialog box before you can send the error report.

Enter or change contact information

	Action
1	On the General tab, under Admin Options, click **User Information**.
2	On the User Information screen, in the left column, complete the following items: • **Name, Email, and Phone.** For an individual account, supply information that support staff can use to contact you. For a shared account, provide information for one user. • **Current Password.** Type the password you used when you logged on. • **Note:** Password is **required** to save changes.
3	When finished, click **Update**. The information you supply is retained until you change it.

Note: The table lists items that may appear on the user Information screen. Your authorization determines which items appear on the screen when you view it.

Item or field	Contents and purpose
Access Authorization and Contact	
Authorization No.	Your OCLC Cataloging Service authorization number.
Institution Symbol	Your library's OCLC symbol. Used to associate your library with records that you add to a database or modify.
Classification Scheme	The classification scheme associated with your authorization number.

Item or field	Contents and purpose
MARC Organization Code	Unique mnemonic code that identifies a library in the *MARC Code List for Organizations*. Also known as a National Union Catalog (NUC) symbol. The Library of Congress maintains the code list and assigns codes to libraries. Required for participate in NACO and other cooperative programs.
Cataloging Level	Your authorization level for WorldCat and the online bibliographic ave file. Defines actions you can take on bibliographic records.
Profiled for Institution Records?	Indicates that your institution is profiled as a contributor and user of institution records, and that your authorization includes IR capabilities. **Yes.** You can create, add, edit, replace, and take other actions on institution records contributed by your library. If this item is not shown, you can view, export, or print IR or derive a new master or constant data record from an IR. You cannot create, edit, or take other actions on IRs.
Profiled for SCIPIO Records?	Indicates that your institution is profiled as a contributor and user of SCIPIO records, and that your authorization includes SCIPIO capabilities. **Yes** indicates you can create, edit, and take actions on your library's institution records. If the item is not show, you have read-only access to SCIPIO records.
Pathfinder Level	Your authorization level for creating and using pathfinders.
Authorities Level	Your authorization level for working with records in the Authority File, the online authorities save file, and the Authority History database.
Local Holdings Level	Your authorization level for local holdings maintenance activities. Defines your privileges for retrieving, editing, creating, and deleting local holdings records.
Dewey Level	Your authorization level for using the WebDewey service (if you subscribe to the service).
Abridged Dewey Level	Your authorization level for using the Abridged WebDewey service (if you subscribe to the service).
Selection Level	Your authorization level for using the WorldCat Selection service (if you subscribe to the service). Levels are: Selector, Acquisitions, and Administrator.
Hand Press Book Level	Your authorization level for retrieving and/or using records in the Hand Press Book database. The database is separate from WorldCat and is accessible by institutions that belong to the Consortium of European Research Libraries (CERL). If you are **not** authorized to access the database, this item does not appear in User Information.

Item or field	Contents and purpose
Name	Your name (first name, last name, initial or middle name if desired). Support staff use the supplied name when contacting you.
E-mail	Your current e-mail address. Enter the address that support staff can use to contact you.
Phone	Your phone number. Enter the complete number, including the area code, that support staff can use to contact you.
Current password	Password for your authorization number. **Required for update.** You must enter your password to update the displayed contact information: Name, E-mail address, or phone number.
System Information	
Session ID	Identifier for your current session.
System	Identifies the environment in which you are using the system. **Production** indicates the current release of the system accessible to all authorized users. Other system names may appear when you use a special-purpose environment, for example, during training.
Host IP Address	Numerical address from which you are connected to the system for the current session.
Browser Type	Product name of the browser software you are using for the current session.
Browser Version	Version number of the browser software you are using for the current session.

5 Set cataloging options

Why use cataloging options?

- Use Cataloging Options to customize Connexion cataloging to make your work as convenient and efficient as possible.
- You do not need to change the setting for any of these options: the system defaults fit most users’ needs. Depending on your tasks and workflow, however, you may want to change selected settings.
- As your tasks and workflow change, review Cataloging Options occasionally; you may want to optimize your settings.

Go to Cataloging Options screen

	Action
1	On the General tab, click **Admin**.
2	At the Preferences screen, click **Cataloging Options**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.
- The following table describes how the buttons work.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	Save changes on this screen for the current session only. When you log off, the system restores your previous default settings.
Save My Default	Save changes on this screen for the current session and future sessions. The new settings remain in effect until you change them.
Reset	Restore original Connexion settings for options on this screen. Reverse any changes you made during the current session or in previous sessions.
Cancel	Reverse any changes you made since you accessed this screen during the current session. Your previously saved settings remain in effect.

Set bibliographic record views

	Action
1	On the Cataloging Options screen, locate the **Bibliographic Record View** settings.
2	Under Bibliographic Record View, Bibliographic Save File Record View, and Bibliographic Constant Data Record View: 1. Click an option button to select **MARC Template** or **MARC Text Area** or **DC Template** or **DC Text Area**. 2. Click **Save My Default** or **Save for Session**. **Default setting:** MARC Template (for all views) **Change view while editing or creating a bibliographic record** • While editing a bibliographic record or constant data record, you can switch views at any time using the View list (top right corner of screen). • Before creating a new bibliographic record or constant data record, you can select the editing view at the Create Record screen or the Create Constant Data screen.

Set mode for single records from search results

- This option specifies your preferred mode for viewing a single record retrieved from the following databases:
  —WorldCat
  —Resource Catalog
  —Bibliographic save file
- The setting applies when you retrieve a single record and when you select a record to view from a results list.

	Action
1	On the Cataloging Options screen, locate the **Mode for Single Record from Search Results** setting.
2	1. Click an option button to select **Display Mode** or **Edit Mode** or **Master Edit Mode**. 2. Click **Save My Default** or **Save for Session**. **Default setting:** Edit Mode.

Set mode for record after Update or Replace

This option specifies the mode for records redisplayed after you take the Update Holdings action or the Replace Record action.

	Action
1	On the Cataloging Options screen, locate the **Bibliographic Record Mode after an Update** setting.
2	1. Click an option button to select **Display Mode** or **Edit Mode**. 2. Click **Save My Default** or **Save for Session**. **Default setting:** Edit Mode.

Specify placement of fixed field and record status area

	Action
1	On the Cataloging Options screen, locate the **Placement of Record Areas** setting.
2	**Fixed Field** Place the fixed field at the top or bottom of the bibliographic record. Click to select one of the option buttons: **Top** or **Bottom**. **Default setting:** Top.
3	**Record Status** View the record status codes at the top or bottom of the bibliographic record. Click to select one of the option buttons: **Top** or **Bottom**. **Default setting:** Bottom.
4	Click **Save My Default** or **Save for Session**.

Specify validation levels for selected actions

Note: You can also set the validation level for exporting on the Export Option screen under **Validate Exported Bibliographic and Authority Records**. If you change the setting on either screen, it changes automatically on the other screen.

Note: When you select Basic or Full validation, each record must pass validation (in addition to the default Structure check) before Connexion completes the update or export action. If a record fails validation, you must correct the errors identified and then retry the update or export.

	Action
1	On the Cataloging Options screen, locate the **Validation Levels** setting.
2	**Set Holdings** Select the level of validation to apply when you set holdings on a record. • **Structure (Default).** Minimum validation. Verifies that indicators, if present, are a single character, that BLvl and Type codes are correct, and that the following fields are present (for some, also checks validity of data): Leader, 001, 005, 008, 040 $c, 049, and 245 $a or 245 $k- • **Basic.** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full.** Verifies record structure (as for basic validation) and also checks relationships between elements. **Default setting:** Structure. **Note:** When you add a record to WorldCat or replace a master record, Connexion always performs full validation.
3	**Export Bibliographic Record** Select the level of validation to apply when you export a single bibliographic record. • **None** No validation for exported records. • **Basic** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full** Verifies record structure (as for basic validation) and also checks relationships between elements. **Default setting:** None.
4	Click **Save My Default** or **Save for Session**.

Specify validation levels for institution records

Note: When you select Basic or Full validation, each record must pass validation (in addition to the default Structure check) before Connexion completes the add or replace action. (For export, the default level is None, but you can change the level to Basic or Full.) If an IR fails validation, you must correct the errors identified and then retry the add, replace, or export action.

Note: You can also set the validation level for exporting IRs on the Export Option screen using the setting labeled **Institution Records** under **Validate Exported Bibliographic and Authority Records**. If you change the setting on either screen, it changes automatically on the other screen.

	Action
1	On the General tab, click **Admin**. At the Preferences screen, click **Cataloging Options**.
2	On the Cataloging Options screen, locate the **Validation Levels** setting.
3	**Add or Replace Bibliographic Institution Record** Select the level of validation to apply when you add or replace an IR. • **Structure (Default).** Minimum validation. Verifies that indicators, if present, are a single character, that BLvl and Type codes are correct, and that the following fields are present (for some, also checks validity of data): Leader, 001, 005, 008, 040 $c, 049, and 245 $a or 245 $k- • **Basic.** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full.** Verifies record structure (as for basic validation) and also checks relationships between elements. **Default setting:** Structure.
4	**Export Bibliographic Institution Record** Select the level of validation to apply when you export a single IR. • **None.** No validation for exported records. • **Basic.** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full.** Verifies record structure (as for basic validation) and also checks relationships between elements. **Default setting:** None.
5	Click **Save My Default** or **Save for Session**.

Designate reviewer institutions

- Use the Reviewer Institutions option to indicate which institutions may access records you submit for review.
- Specifying a default list of reviewers is **optional**. A default list can make submitting records for review more convenient.
- **No default reviewers specified.** If you do not specify default reviewers, you must enter the appropriate symbol(s) each time you take the **Submit For Review** action. During each session, the system retains and displays the list you supplied in your most recent submittal. When you log off, the system deletes the list.
- **Default reviewers specified.** If you specify a list, the system displays the default list when you take the **Submit For Review** action. You can use the default list as is, edit the list, or delete it and enter a new list. Modifications to the default list are

retained for later submittals during the same session. When you log off, the system reverts to the default list. You can change the default reviewer list at any time.

	Action
1	At the Cataloging Options screen, locate the item **Reviewer Institutions**. In the text box, type 1 or more OCLC symbols for institutions whose staff may access records you submit for review. Separate multiple symbols with semicolons. The system ignores spaces before or after the semicolons. You can enter institution symbols in uppercase or lowercase. The system stores them in uppercase. **Examples: ABC;DEF;XYZ** or **ABC; DEF; XYZ** or **abc;def;xyz**
2	Save the list of reviewer institutions as the default for future sessions or use the list for the current session only. Click **Save My Default** or **Save for Session**. **Note: Symbols not verified** Institution symbols specified in the Reviewer Institutions option are not checked when you save the settings on the Options screen. The system checks institution symbols for reviewers **only** when you submit a record for review.

Select variable fields to transfer to derived bibliographic master records or constant data records

- This setting determines which variable fields transfer to a derived bibliographic master record or bibliographic constant data record.
- **Note:** A few variable fields **never** transfer to derived records:

—MARC fields in the 01x tag group: 010, 012, 013, 015, 016, 017, 018, and 019.

—MARC fields 029, 042, 066, 850, 886, 887, 938, 956, and 987.

	Action
1	On the Cataloging Options screen, locate the **Derive Record Fields for Institution Records** setting.
2	**Select variable fields to transfer** • To transfer a field or a field group to a derived bibliographic record or bibliographic constant data record, select the check box for the field(s) you want to include. • To prevent transfer of a field or field group, clear the check box. **Default setting:** The MARC tag groups 1xx through 8xx are selected. Other check boxes are cleared.
3	Click **Save My Default** or **Save for Session**.

Select variable fields to transfer to derived institution records

This setting determines which variable fields transfer when you derive an IR from a master record or an institution record.

	Action
1	On the Cataloging Options screen, locate the **Derive Record Fields for Institution Records** setting.
2	**Select variable fields to transfer** • To transfer a field or a field group to a derived institution record, select the check box for the field(s) you want to include. • To prevent transfer of a field or field group, clear the check box. **Default setting:** All listed MARC fields and tag groups are selected.
3	Click **Save My Default** or **Save for Session**.

Apply a default My Status to save file records and constant data records

- The default text appears in the My Status text box when you save a bibliographic record to the save file or save a new constant data record.
- You can change the default My Status text if it is not appropriate for a specific record.

	Action
1	On the Cataloging Options screen, locate the **My Status** setting.
2	**My Status for Saved Bibliographic Records** In the text box, type a note or identifier (up to 40 characters) you want to apply when saving a bibliographic record. **Default setting:** Text box empty. No default My Status applied.
3	**My Status for Constant Data Records** In the text box, type a note or identifier (up to 40 characters) you want to apply when saving a newly created constant data record. **Default setting:** Text box empty. No default My Status applied.
4	Click **Save My Default** or **Save for Session**.

Customize WorldCat results

- The WorldCat Results option determines whether search results present multiple screens of 10 records per screen or a scrollable list of 25 or 100 records.
- This option applies to search results, whether you view the records as a truncated list or a brief list. It does not affect group lists.

	Action
1	On the Cataloging Options screen, locate the **WorldCat Results** setting.
2	Click an option button to specify the number of records per screen. Select **10 Records** or **25 Records** or **100 Records**. **Default setting:** 100 Records.
3	Click **Save My Default** or **Save for Session**.

Specify display of web pages linked to records

	Action
1	On the Cataloging Options screen, locate the **View Web Page Options** setting.
2	**View Web Page options**. Indicate how you want to view a web page associated with a bibliographic record. Click to select one of the option buttons: • **Lower Frame** to see the web page in a frame below the frame that contains the record. • **Separate Browser** to open a separate browser window to display the web page. • **Do Not View Web Pages Automatically** to view the record only. **Default setting:** Do Not Automatically View Web Pages.
3	Click **Save My Default** or **Save for Session**.

Specify display of cited OCLC control numbers in fields 760-787

- Linked entry fields (MARC tag numbers **760-787**) let you refer to a related bibliographic record.
- For these fields, you simply enter the OCLC control number of the related record and Connexion automatically inserts data from the related record.
- By default, Connexion hyperlinks the OCLC control number that you entered for the related record. You can change this option so that instead, the entire field is displayed as editable text with no hyperlink.

  If you often create or edit records that contain cited OCLC control numbers, you may prefer that these fields display as editable text.
- **Notes:**
  - —**MARC Template view only.** Hyperlinks to related records are available only in MARC Template edit view.
  - —**Manually unlink or relink OCLC control numbers:**
    i. Open the Functions list for the field that contains the hyperlinked OCLC control number.
    ii. Click **Unlink OCLC Number** to remove the hyperlink, or click **Link OCLC Number** to restore it.
  - —**8XX fields are not hyperlinked.** Although you can also use series added entry fields 800, 810, 811, and 830 to cite related records for items in a series, Connexion does not hyperlink the OCLC number, nor can you link the number manually.

To change the cataloging option for automatically hyperlinking the OCLC number of a cited record in 760-787 fields:

	Action
1	On the Cataloging Options screen, locate the **Show Cited OCLC Control Numbers as Links** setting.
2	Click to select one of the following buttons: • **Show as Editable Text** (simplifies revision of text in the fields). • **Show as Live Link** (lets you view a cited record by clicking the linked control number) **Default:** Show as Live Link.
3	Click **Save My Default** or **Save for Session**.

Specify Help links for fixed-field element labels

- The default setting for the **Fixed Field Label Linking Options** option (**Active**) links fixed-field element labels to relevant information in the online version of *OCLC Bibliographic Formats and Standards*.
- You may want to change the setting for this option to **Inactive** if you use the <Tab> key to move through fixed-field elements while editing bibliographic records.
- When Help links are **active**, you must press <Tab> (or <Shift><Tab>) twice to move from one element to the next.
- With Help links **inactive**, you move between elements by pressing <Tab> or <Shift><Tab> once.

	Action
1	On the Cataloging Options screen, locate the **Fixed Field Label Linking Options** setting.
2	**Fixed Field Label Linking Options**. Indicate whether you want labels for fixed-field elements linked to appropriate sections in the online version of *OCLC Bibliographic Formats and Standards*. Click to select one of the option buttons: • **Inactive** to remove the Help links from element labels. Press <Tab> or <Shift><Tab> once to move between fixed-field elements while editing. • **Active** to retain the Help links. Press <Tab> or <Shift><Tab> twice to move between fixed-field elements while editing. **Default setting:** Active. Element labels are linked to relevant information.
3	Click **Save My Default** or **Save for Session**.

Specify label format for single labels

- This setting determines the format the system uses to display a single label set for a bibliographic record. The default label format is SL4.
- When you create a file of labels for a group of flagged records, the system uses SL4 format. You can change the label format after importing the file to the OCLC Cataloging Label Program.

	Action
1	On the Cataloging Options screen, locate the **Label Format** setting.
2	**Label Format**. Specify the label format to use for viewing and printing a single label set for a bibliographic record. **Default setting:** SL4. Click to select one of the option buttons: • **SL4** • **SL6** • **SLB** • **SP1**
3	Click **Save My Default** or **Save for Session**.

Specify default file name for label files

Why use this setting? By default, the system assigns the name **Label.svs** to downloaded label files. If you prefer a different name and/or extension to designate label files, use this option to have the system automatically assign your preferred name.

Action	Result
Optional. Specify a file name for downloaded label files. • On the Cataloging Options screen, under Label File Name, type the file name and extension in the **File Name** text box. • Or keep the default file name, **Label.svs**.	• **Name specified.** When you download a label file from the Download Label Files screen, the system automatically supplies the specified file name and extension. • **Default name.** If you do not specify a file name, the system supplies the default name, **Label.svs**. • **Change name or extension during downloading.** If necessary, you can change the supplied file name before saving the file.

Specify file type for label files

Why use this setting? The default file type is **Institution**. If you prefer to create label files for a specific authorization number, change the setting for this option to **Individual**.

Action	Result
Optional. Specify the type of label file to use. On the Cataloging Options screen, under Label File Type, select **Institution** (default setting) or **Individual**. **Note.** This setting determines how records accumulate in each file.	If you select: • **Institution label file (default setting).** Connexion creates label files that contain labels created by anyone logged on with an authorization number linked to your library's OCLC symbol. • **Individual label file.** Connexion creates label files that contain labels created by a user logged on with a specific authorization number.

Save records marked for labels

- **Why use this setting?** When you want to create labels for a group of bibliographic records at once, use the Mark for Label action to mark each record as ready for label creation. To create labels for the group, retrieve the marked records, flag them and take the **Create Label File for Flagged Records** action.
- However, you must save the records in order to retrieve them by searching for the **Label - Ready** status.

Action	Result
On the Cataloging Options screen, under Mark for Label and Save Record, • Select **On** or **Off**. Or • Keep the original default setting, **Off**.	• **On**. If you select **On**, Connexion saves each bibliographic record that you mark for labels. • **Off**. (default setting) If you select **Off**, Connexion does not automatically save bibliographic records marked for labels.

Get a classification number for a bibliographic record

- **Why use these settings?** When you want to use the Classify command to automatically insert a suggested classification number in a record, these options specify: and which field you want to create to contain the inserted number.

  —Whether you want to use the Library of Congress or the Dewey class scheme

  —Which field you want to create to contain the inserted class number

  Notes:

  —The Classify command opens the prototype OCLC Classify Web service (http://classify.oclc.org/), a FRBR-based service created by OCLC Research. The service automatically retrieves a classification number in a matching WorldCat record for any material type—books, DVDs, CDs, and more.

  —The service searches WorldCat for matching records from which to supply a number based on the following numbers in the bibliographic record, in this order: OCLC number, ISBN, ISSN, UPC, LCCN.

- See more details in the Connexion browser guide “Edit Bibliographic Records.”

	Action
1	On the Cataloging Options screen, locate the **Classify** settings.
2	Click one of the following buttons to determine which classification scheme you want to use: • Dewey • Library of Congress (**default**)
3	In the **Call Number Field,** enter the tag of the field in which you want the class number inserted. **Default:** 090
4	Click **Save My Default** or **Save for Session**.

Show or hide field details in truncated lists

- The Truncated List Details option lets you choose whether to view a popup list of all indexed fields for the term in the first column of a truncated list.
- When you place the mouse pointer on an item in the list, a yellow screen tip appears showing additional record fields from the record.

	Action
1	On the Cataloging Options screen, locate the **Truncated List Details** setting.
2	Click an option button to specify the appearance of the list of indexed fields. For most users, the default setting works best. However, if you use Internet Explorer, you can select any of the three **On** options. Or select **Off** to hide field details. **Default setting: On - Show using optimized screen tips** **Note:** Netscape/Mozilla users should keep the default setting or select **Off**.
3	Click **Save My Default** or **Save for Session**.

Bibliographic record edit views (edit modes)

The following table describes record appearance for records in edit modes (locked master records or working copy records in edit mode), for MARC and Dublin Core formats.

	Action
1	On the Cataloging Options screen, locate the **WorldCat Results** setting.
2	Click an option button to specify the number of records per screen. Select one of the **On** options to view the field details and choose how the popup appears. Or select **Off** to prevent display of the field details. **Default setting:** On - Show using optimized screen tips.
3	Click **Save My Default** or **Save for Session**.

View	Description
MARC Template	• Template view for editing in Machine-Readable Cataloging (MARC) format. Compliant with MARC 21. MARC 21 fields may be supplemented with additional fields defined in OCLC-MARC. • Content for each field is viewed and edited in a row of text boxes. Provides Functions list for adding/removing fields. Authority control functions available (control individual fields or all controllable fields). • Input guidelines available for variable fields via **Help** on Functions list. Templates simplify entering fixed field (008) and 006 field(s). Help buttons provide input guidelines for 008 and 006. Elements in fixed-length fields linked to specific guidelines.
MARC Text Area	• Text area view for editing MARC-format record; all variable fields are viewed and edited in a single large text box. Lets experienced MARC users edit efficiently by reducing interactions with the server. Authority control functions not available. Record appearance in display mode same as MARC Template view. • Templates simplify entering fixed field (008) and 006 field(s); Help buttons provide input guidelines for 008 and 006, but not for other fields. Elements in fixed-length fields linked to specific guidelines.
DC Template	• Template view for editing in Dublin Core format. Provides drop-down lists for selecting DC element labels plus optional qualifiers and schemes (specific sets of qualifiers and schemes appropriate for each element). Uses full qualifier labels and standard syntax for adding qualifiers and schemes. • Content for each field is viewed and edited in a row of text boxes. Provides Functions list for adding/removing fields. Authority control functions available (control individual fields or all controllable fields). • Input guidelines available for DC elements via **Help** on Functions list.
DC Text Area	• Text area view for editing Dublin Core format records. All fields are viewed and edited in a single large text box. Lets DC users edit efficiently by reducing interactions with the server. Record appearance in display mode same as DC Template view. • Add Element function simplifies entry of labels, qualifiers, and required punctuation and spacing. Authority control functions not available. • Direct access to input guidelines for DC elements not available.

Bibliographic record display views (display mode)

The following table describes record appearance for records in display mode, for MARC and Dublin Core formats.

View	Description
MARC Template or MARC Text Area	• View for displaying records in Machine-Readable Cataloging (MARC) format. Compliant with MARC 21. MARC 21 fields may be supplemented with additional fields defined in OCLC-MARC. Input guidelines available for variable fields via hyperlinked field tags. **Help** buttons provide input guidelines for 008 and 006. Elements in fixed-length fields linked to specific guidelines. • MARC display view is the **same** whether you select MARC or MARC Text Area from the View list.
DC Template or DC Text Area	• View for displaying records in Dublin Core format. Uses full qualifier labels and standard syntax for adding qualifiers and schemes. • Dublin Core display view is the **same** whether you select DC Template or DC Text Area from the View list.
DC HTML Preview	• Dublin Core metadata elements presented in HTML. For **display/export only**; you cannot edit records or take any actions (except export) while using this view. • DC HTML Preview available (on View list) while displaying or editing record in any view. Export Record in DC HTML available only when displaying or editing record in DC Template or DC Text Area view.
DC RDF Preview	• Dublin Core metadata elements presented in Resource Description Framework (RDF). For **display/export only**; you cannot edit records or take any actions (except export) while using this view. • DC RDF Preview available (on View list) while displaying or editing record in any view. Export Record in DC RDF available only when displaying or editing record in DC Template or DC Text Area view. **Note:** RDF is a structure represented in Extensible Markup Language (XML).

	Action
1	On the Cataloging Options screen, locate the **Classify** setting.
2	Select the classification scheme you want to use to get a recommended classification number for a displayed bibliographic record using the Classify Web service (Edit list > Classify). Select one of the following: • Dewey Or • Library of Congress
3	In the **Create the following variable field from Classify result** box, enter the tag for the field where you want to insert the classification number.
4	Click **Save My Default** or **Save for Session**.

6 Set Local Holdings options

Why use local holdings options?

- Local holdings options let you customize Connexion to make your work as convenient and efficient as possible.
- Currently, the only option for local holdings is the ability to supply default text to be inserted in the My Status field of a newly created local holdings constant data record. You do not need to use this option. Depending on your tasks and workflow, you may find it helpful.
- As the system is enhanced, and as your tasks and workflow change, review the available options. You may want to optimize your settings.

Go to Local Holdings Options screen

	Action
1	On the General tab, click **Admin**.
2	At the Preferences screen, click **Local Holdings Options**.

Apply a default My Status to LH constant data records

- The default text appears in the My Status text box when you save a new LH constant data record.
- You can change the default My Status text if it is not appropriate for a specific record.

	Action
1	On the Local Holdings Options screen, locate the **My Status** setting.
2	**My Status for LH Constant Data Records** In the text box, type a note or identifier (up to 40 characters) you want to apply when saving a newly created LH constant data record. **Default setting:** Text box empty. No default My Status applied.
3	Click **Save My Default** or **Save for Session**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.
- The following table describes how the buttons work.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	Save changes on this screen for the current session only. When you log off, the system restores your previous default settings.

Button	Purpose/Result
Save My Default	Save changes on this screen for the current session and future sessions. The new settings remain in effect until you change them.
Reset	Restore original Connexion settings for options on this screen. Reverse any changes you made during the current session or in previous sessions.
Cancel	Reverse any changes you made since you accessed this screen during the current session. Your previously saved settings remain in effect.

7 Cataloging tab options

Why use Cataloging tab options?

- Streamline your work by hiding buttons and options for cataloging functions you do not use.
- Simplify learning for new staff or limit staff access to selected functions.

Go to Cataloging Tab Options screen

	Action
1	On the General tab, under Admin Options, click **Preferences**.
2	At the Preferences screen, click **General Options**.
3	On the General Options screen, click **Interface Customization Options**.
4	On the Interface Customization screen, find the section labeled **Select Service Tabs for Navigation Bar**.
5	In the list of service tabs, click **Cataloging**.

Select Cataloging tab options to show or hide

- To hide an option on the Cataloging tab, clear the check box for that option.
- To hide a group of options (for example, all options for creating records or constant data), clear the check box for that Options list (for example, Create Options). Hiding an Options list hides the related button (for example, the Create button)

	Action
1	On the Cataloging Tab Options screen, find the check box for the specific option or Options list you want to show or hide.
2	Clear the check box to remove any option or Options list (and related button) from the Cataloging tab. Select the check box to restore any option or Options list (and related button) on the Cataloging tab. **Default setting:** All check boxes selected. All available Options lists, buttons, and options appear on the Cataloging tab.
3	Save changes as default or use for current session only. • Click **Save My Default** or **Save for Session**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	• Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.

Button	Purpose/Result
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

8 Set authority options

Why set authority options?

- Use Authority Options to customize Connexion browser to make your work as convenient and efficient as possible.
- You do not need to change the setting for any of these options: the system defaults fit most users' needs. Depending on your tasks and workflow, however, you may want to change selected settings.
- As your tasks and workflow change, review Authority Options occasionally; you may want to optimize your settings.

Go to Authority Options screen

	Action
1	On the General tab, click **Admin**.
2	At the Preferences screen, click **Authority Options**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	• Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

Select authority record views

Make your preferred edit view (MARC Template or MARC Text Area) the default for working with authority records.

	Action
1	On the Authority Options screen, locate the **Authority Record View** settings.
2	Under Authority Record View, Authority Save File Record View, and Authority Constant Data Record View, • Click an option button to select **MARC Template** or **MARC Text Area**. **Default setting:** MARC Template (for all views)
3	Click **Save My Default** or **Save for Session**. **Change view while editing or creating a bibliographic record** • While editing an authority record or authority constant data record, you can switch views at any time using the View list (top right corner of screen). • Before creating a new authority record or authority constant data record, you can select the editing view at the Create Record screen or the Create Constant Data screen.

Set mode for single record from search results

- This option specifies your preferred mode for viewing a single record retrieved from the following databases:

  —Authority File

  —Authority save file

- The setting applies when you retrieve a single record and when you select a record to view from a results list.

	Action
1	On the Authority Options screen, locate the **Mode for Single Record from Search Results** setting.
2	• Click an option button to select **Display** or **Edit Mode** or **Master Edit Mode**. **Default setting:** Display Mode.
3	Click **Save My Default** or **Save for Session**.

Specify placement of fixed field and record status areas

Choose to place the fixed field and (for saved records) the record status area at either the top or bottom of the authority record.

	Action
1	On the Authority Options screen, locate the **Placement of Record Areas** setting.
2	**Fixed Field** Place the fixed field at the top or bottom of the authority record. Click to select one of the option buttons: • **Top** Or • **Bottom** **Default setting:** Top.

	Action
3	**Record Status** View the workflow status at the top or bottom of the authority record (save file records only). Click to select one of the option buttons: • **Top** Or • **Bottom** **Default setting:** Bottom.
4	Click **Save My Default** or **Save for Session**.

Specify validation level for an exported authority record

Note: You can also set the validation level on the Export Option screen under **Validate Exported Bibliographic and Authority Records**. If you change the setting on either screen, it changes automatically on the other screen.

	Action
1	On the Authority Options screen, locate the **Validation Levels** setting.
2	Select the level of validation to apply when you export a single authority record. • **None** No validation for exported authority records. • **Basic** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full** Verifies record structure (as for basic validation) and also checks relationships between elements. **Default setting:** None. **Note:** When you select Basic or Full validation, each record must pass validation before Connexion completes the export action. If a record fails validation, you must correct the errors identified and then retry the export.
3	Click **Save My Default** or **Save for Session**.

Specify display of authority control results

Specify your preference for viewing results when you control headings in bibliographic records. You can view and work with the results (select a matching authority record, change the heading text and search again) in a lower frame (below the frame that contains the bibliographic record) or in a separate browser window.

Note: not for mult-control of subject headings This setting does not apply to the multi-control function used to control 6xx headings with 2d indicator 0 or 4. The system always presents multi-control results in the separate Control Multipart Heading window.

	Action
1	On the Authority Options screen, locate the **Authority Control** setting.
2	**Authority control** Indicate how you want to view results when you control a heading field in a bibliographic record. Click to select one of the option buttons: • **View Authority Information in Lower Frame** to see the results in a frame below the frame that contains the bibliographic record. • **View Authority Information in Separate Browser Window** to open a separate browser window to display the results. **Default setting:** View Authority Information in Lower Frame.
3	Click **Save My Default** or **Save for Session**.

Designate reviewer institutions

- Use the Reviewer Institutions option to indicate which institutions may access records you submit for review.
- Specifying a default list of reviewers is **optional**. A default list can make submitting records for review more convenient.
- **No default reviewers specified.** If you do not specify default reviewers, you must enter the appropriate symbol(s) each time you take the **Submit For Review** action. During each session, the system retains and displays the list you supplied in your most recent submittal. When you log off, the system deletes the list.
- **Default reviewers specified.** If you specify a list, the system displays the default list when you take the **Submit For Review** action. You can use the default list as is, edit the list, or delete it and enter a new list. Modifications to the default list are retained for later submittals during the same session. When you log off, the system reverts to the default list. You can change the default reviewer list at any time.

	Action
1	At the Authority Options screen, locate the item **Reviewer Institutions**. In the text box, type 1 or more OCLC symbols for institutions whose staff may access records you submit for review. Separate multiple symbols with semicolons. The system ignores spaces before or after the semicolons. You can enter institution symbols in uppercase or lowercase. The system stores them in uppercase. **Examples: ABC;DEF;XYZ** or **ABC; DEF; XYZ** or **abc;def;xyz**
2	Click **Save My Default** or **Save for Session**. **Note: Symbols not verified** Institution symbols specified in the Reviewer Institutions option are not checked when you save the settings on the Options screen. The system checks institution symbols for reviewers **only** when you submit a record for review.

9 Authorities tab options

Why use Authorities tab options?

- Streamline your work by hiding buttons and options for authorities functions you do not use.
- Simplify learning for new staff or limit staff access to selected functions.

Go to Authorities Tab Options screen

	Action
1	On the General tab, under Admin Options, click **Preferences**.
2	At the Preferences screen, click **General Options**.
3	On the General Options screen, click **Interface Customization Options**.
4	On the Interface Customization screen, find the section labeled **Select Service Tabs for Navigation Bar**.
5	In the list of service tabs, click **Authorities**.

Select Authorities tab options to show or hide

- To hide an option on the Authorities tab, clear the check box for that option.
- To hide a group of options (for example, all options for creating records or constant data), clear the check box for that Options list (for example, Create Options). Hiding an Options list hides the related button (for example, the Create button)

	Action
1	On the Authorities Tab Options screen, find the check box for the specific option or Options list you want to show or hide.
2	Clear the check box to remove any option or Options list (and related button) from the Authorities tab. Select the check box to restore any option or Options list (and related button) on the Authorities tab. **Default setting:** All check boxes selected. All available Options lists, buttons, and options appear on the Authorities tab.
3	Save changes as default or use for current session only. • Click **Save My Default** or **Save for Session**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	• Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.

Button	Purpose/Result
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

10 Set export options

About export options

- **Export methods.** You can export bibliographic records or authority records to a file on the Connexion server, and then download the file to your workstation. Or you can export records directly to your local system via a TCP/IP connection.
- **Records.** You can export bibliographic records retrieved from WorldCat or the bibliographic save file. You can export authority records retrieved from the Authority File or authority save file.
- **Single or batch export.** With either export method, you can export one record at a time or export a group of flagged records.
- **Formats.** You can export bibliographic records in MARC, in Dublin Core HTML, or in Dublin Core RDF using either export method. For export to a local system, verify which formats your local system can accept. You can export authority records in MARC format only.
- **Validation for bibliographic records.** You can choose to have Connexion validate all exported bibliographic records (the default setting), or you can turn off automatic validation for exported records.

Go to Export Options screen

	Action
1	On the General tab, click **Admin**.
2	At the Preferences screen, click **Export Options**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.
- The following table describes how the buttons work.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	Save changes on this screen for the current session only. When you log off, the system restores your previous default settings.
Save My Default	Save changes on this screen for the current session and future sessions. The new settings remain in effect until you change them.
Reset	Restore original Connexion settings for options on this screen. Reverse any changes you made during the current session or in previous sessions.
Cancel	Reverse any changes you made since you accessed this screen during the current session. Your previously saved settings remain in effect.

Format for exporting flagged bibliographic records

Why use this setting? Select a format to export groups of flagged bibliographic records in your preferred format automatically, without selecting a format at the time of export.

Action	Result
On the Export Options screen, under Flagged Bibliographic Record Export Format, • Select **MARC** or **Dublin Core HTML** or **Dublin Core RDF**. Or • Keep the original default setting, **None**.	**Format specified.** When you export flagged bibliographic records, the system uses the selected format automatically. **None (original default setting).** When you export flagged records, the system displays a screen that prompts you to select an export format.

Validate exported bibliographic and authority records

- Choose the level of validation for a single exported bibliographic record, bibliographic institution record, and/or authority record.
- Validation levels apply only when you export a single master bibliographic record, bibliographic institution record, or authority record. Connexion does no validation when you export multiple records **Note:** You cannot export multiple institution records (because you cannot save IRs). Single-record export is the only supported method for exporting IRs.
- **Validation increases time required for export.** When you choose to validate exported records, exporting takes longer to complete.

Action	Result
On the Export Options screen, under Validate Exported Bibliographic and Authority Records, select the validation level for each record type. Keep the default setting, **None**, or select **Basic** or **Full**. **Note: Level for exported institution records** This area also lets you choose a validation level for exported bibliographic institution records **Default setting** None.	• **None** (default setting). No validation for exported records. • **Basic** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full** Verifies record structure (as for basic validation) and also checks relationships between elements. **Note:** When you choose Basic or Full validation for exported bibliographic records, Connexion changes each record’s Validate status and Export status as appropriate. Records that fail validation cannot be exported until you correct the errors identified.

Save records marked for export (bibliographic records only)

- **Why use this setting?** When you want to export a group of bibliographic records at once, use the Mark for Export action to mark each record as ready for export.
- However, to do batch export, you must save the records. Only saved records can be retrieved by searching for the **Export - Ready** status, flagged, and exported as a group.

Action	Result
On the Export Options screen, under Mark for Export and Save Record, • Select **On** or **Off**. Or • Keep the original default setting, **Off**.	• **On**. If you select **On**, Connexion saves each bibliographic record that you mark for export. • **Off**. (default setting) If you select **Off**, Connexion does not automatically save bibliographic records marked for export.

Specify fields to delete from exported bibliographic or authority records

Note: The setting for bibliographic records applies to both bibliographic master records and to bibliographic institution records. On export, Connexion deletes the same fields from an IR or a master record.

Action	Result
Fields to Delete on Export (Optional) Specify the fields you want to remove from each bibliographic and/or authority record before exporting the record for local use. On the Export Options screen, under Fields to Delete on Export, separate text boxes let you specify fields to remove from each record type. In either text box, type the 3-digit MARC tag numbers for the fields to delete. **Note:** The setting for bibliographic records applies to both bibliographic master records and to bibliographic institution records. On export, Connexion deletes the same fields from an IR or a master record.	• To delete a single field, type the tag number in the text box. • To delete a range of fields, type the first and last tag to be removed, separated by a hyphen. • Separate single tags and tag ranges with commas. **Example:** In the Bibliographic Records text box, type 920, 938, 945-999 to remove fields 920 and 938, and fields 945 through 999, from all exported bibliographic records.

Export to a file (default setting)

- Use export to a file if you have **not** set up a direct TCP/IP connection from OCLC Connexion to your library's local system.
- **Export files:**

—Are created and stored on the Connexion server.

—**Allow appending until downloaded.** You can continue exporting to the same file until you download the file.

—Contain records in **one format**. Separate export files are created for authority records. If you export bibliographic records in more than one format, such as

MARC and Dublin Core HTML, the system creates a separate file for each export format used.

—Contain records of a specific format that are exported either by any user from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file type is **Institution**. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to **Individual**.

—Remain available for download for 30 days from the file creation date. After 30 days, the system automatically deletes export files.

- **Exported authority records.** If you export authority records, the Download Export Files screen includes a separate list for authority record export files.

	Action	Result or Note
1	On the Export Options screen, under Export Destination, select **Export to a File**.	• When you export records, the system adds the records to a file on the Connexion server. • Until you download the file, records you export are added to the export file. • To use the exported records, download the export file to your workstation.
2	**Optional.** Specify a file name for downloaded export files. • On the Export Options screen, under Export File Name, type the file name and extension in the **File Name** text box. • Or keep the default file name, **export.dat**.	• **Name specified.** When you download an export file from the Download Export Files screen, the system automatically supplies the specified file name and extension. • **Default name.** If you do not specify a file name, the system supplies the default name, **export.dat**. • **Change name or extension during downloading.** If necessary, you can change the supplied file name before saving the file.
3	**Optional.** Specify the type of export file to use. On the Export Options screen, under Export File Type, select **Institution** (default setting) or **Individual**. **Note:** This setting determines how records accumulate in each file. Regardless of this setting, Connexion checks for record format and creates a separate export file fore each format.	If you select: • **Institution export file (default setting).** Connexion creates export files that contain records exported by anyone logged on with an authorization number linked to your library's OCLC symbol. • **Individual export file.** Connexion creates export files that contain records exported by a user logged on with a specific authorization number.

Export to local system via TCP/IP

- Your local system must be able to accept records directly via TCP/IP.
- If your site uses a firewall to isolate internal systems from the Internet, you must provide a port that allows OCLC Connexion to access your local system through the firewall.
- Your site's firewall system must recognize and accept export data sent by the server from **any** numeric IP address within the following address range: `132.174.2.0/24` (all numeric addresses from 132.174.2.1 through 132.174.2.253). If you have questions about firewall requirements for TCP/IP export, contact OCLC Customer Support.

E-mail a support question: To e-mail questions to Customer Support, at the top right corner of the Connexion browser screen, click **Contact**. Select **Problem/ Question** as the message type and select **OCLC Support** as the recipient.

	Action	Result or Note
1	On the Export Options screen, under Export Destination, select **Export to a TCP/IP Connection**.	When you export records, the system sends each record directly to your local system via a TCP/IP connection you specify.
2	Under TCP/IP Connection Options, complete both items: • **Host Name.** Type either the **TCP/ IP** name (example: **lib.domain.edu**) or the numeric **TCP/IP address** of the host computer that runs your local system. • **Port Number.** Type the number of the port at your site that provides direct access to your local library system.	**Firewall setup.** If your local system is behind your site's firewall, complete the following steps: 1. Specify a host name/address and port number that provide access to your local system through the firewall. 2. Configure the firewall software to recognize and accept data from **any** numeric IP address within the following address range: `132.174.2.0/24` (all numeric addresses from 132.174.2.1 through 132.174.2.253). 3. The **port range** is the same for any IP address: 30000-30499.
3	Under TCP/IP Host Settings, select one or both of the options if required for your local system. **Default setting:** both check boxes cleared, options not selected.	**Permanent Connection** Select the check box **Notify Host before Disconnect** Select the check box

	Action	Result or Note
4	Under TCP/IP Timeouts and Retries, accept the default values unless your local system requires that you change the.	**Timeout** Specify how long (in seconds) the system should wait for a response from your local system before abandoning the attempt to connect. **Retries** Specify the number of times the system should retry to connect to your local system after a failed attempt. **Delay** Specify how long (in seconds) the system should wait after connecting to the local system before transmitting data to the local system.
5	Under TCP/IP Local System User Information, • Supply the information your local system requires for authentication (Logon ID, Password, and/or User ID). • Select the appropriate check box(es) to have the system send the information you supplied when requesting access to your local system.	

TCP/IP export options: definitions

TCP/IP setting	Definition	Notes
Host Name	• IP address or IP name for the local system host. • **IP address**. Internet Protocol address. Also referred to as the Internet address. A unique address for a machine in a TCP/IP network. It is a 32-bit address comprising four 8-bit segments, each separated by a period (.). Each 8-bit segment is a number from 0 to 255. • **IP name**. Internet Protocol name. A unique name for a machine in a TCP/IP network that you can use in place of the machine's IP address. It comprises at least two segments, each separated by a period (.).	
Port Number	• Port number on the host to which you want to export records. • **TCP/IP port**. A TCP/IP software channel through which other machines on a TCP/IP network communicate with a TCP/IP host for specified services.	**Firewalls** If your site uses a firewall to isolate internal systems from the Internet, the port number for export to your local system must provide a path through the firewall, directly to your local system.
Permanent Connection	If your local system disconnects you after each export, select this check box to stay connected.	
Notify Host before Disconnect	• If your local system requires that you notify it before you disconnect, select this check box. • When this box is selected, the system sends a notification message to your local system before disconnecting.	

TCP/IP setting	Definition	Notes
Timeout	• Specify the number of seconds to wait for local system response. There is no upper limit. • When the specified time expires, the system considers the export to have failed and closes the TCP/IP export destination.	
Retries	• Specify the number of times to retry connecting to the local system if the first try fails. • There is no upper limit.	
Delay	• Specify the number of seconds to wait after connecting to the local system before transmitting data to the local system. • There is no upper limit.	
Send Logon ID	• Select this check box to send the logon ID and password before each export to the local system. • Enable this setting only if your local system vendor specifies it.	
Logon ID	If your local system requires a logon ID before each export, type the local system logon ID in this text box.	
Password	If your local system requires a password for authorization, type the password in this text box.	
Send User ID	Select this check box to send the user ID before each record exported to your local system.	
User ID	If required for your local system to process the export, type ID of the user authorized to export records.	

11 Set pathfinder preferences

Why set pathfinder preferences?

- Indicate whether you prefer to edit pathfinders in outline view or linear view.
- Customize the outline view for editing pathfinders.
- Customize display of pathfinder options in header elements. Select options to expand (show) or collapse (hide).

How to set pathfinder preferences

	Action
1	1. On the General tab, under Admin Options, click **Preferences**. 2. On the Preferences screen, click **Pathfinder Option**.
2	**Pathfinder views.** Under **Pathfinder Record View**, **Pathfinder Save File Record View**, and **Pathfinder Constant Data Record View**, select the view you want to use for editing pathfinders. • Click to select the option button for your preferred view (Linear or Outline). While editing a pathfinder, you can switch views at any time. **Default setting:** Linear.
3	**Pathfinder Options display** Under Pathfinder Options view, choose which pathfinder options to hide (collapse) or show (expand) when you create a new pathfinder or begin editing a pathfinder. **Options** • Available in the Pathfinder Header and/or in Header elements. • Determine what information appears (in the entire pathfinder or in the part subordinate to the header), how the content is formatted, and how users navigate to or from that specific header. **Default setting:** All option groups are expanded. You can • **Hide (collapse) all Options groups.** Select the option button labeled **Collapse Options**. • **Show (expand) all Options groups.** Select the option button labeled **Expand Options**. • **Show (expand) selected Options group(s).** Select the option button for each group you want to show (expand). Clear the option button for each group you want to hide (collapse). **Note:** You can expand or collapse option groups at any time while editing a pathfinder. Your settings control initial display, not availability, of pathfinder options.
4	**Pathfinder Outline View**. • Customize the pathfinder outline view by selecting a horizontal or vertical screen split and specifying relative frame sizes. **Default settings:** horizontal screen split with top frame size of 65%.
5	**Change default or change for current session** • To use the settings for the current session only, at the top or bottom of the Pathfinder Options screen, click **Save For Session**. Or • To use the settings for future sessions, click **Save My Default**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	• Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

12 Set Dewey options

Options for WebDewey or Abridged WebDewey

You need to set WebDewey options if

- You subscribe to WebDewey or Abridged WebDewey.
- You want to change default settings.

Why set WebDewey options?

- Specify preferences for viewing selected elements in DDC records.
- Specify whether to show existing user notes in displayed DDC records.
- Select the screen you want displayed immediately after you start a new Dewey-only session from a cataloging session. Select the screen you want displayed immediately after you start a new cataloging session from a Dewey-only session.

Options for shared WebDewey authorizations

- Each WebDewey authorization has **one** set of default options stored on the WebDewey server.
- Users who share an authorization can establish a set of defaults for use by the group.
- Users who prefer different settings can modify the defaults after logging in and then click the **Save for Session** button to apply changes without affecting the group's shared settings.

How to set Dewey options

	Action
1	**Go to the Dewey Services Options screen** 1. On the General tab, click **Admin**. 2. At the Preferences screen, click **Dewey Services Options**.
2	**Specify display of the DDC hierarchy and segmentation information in DDC records** On the Dewey Services Options screen, under DDC Record Options, select **Show** or **Hide** for each item: • **Hierarchy.** Show or hide the list of broader classes and one narrower class associated with a DDC class number. • **Segmentation Instructions (not available for Abridged WebDewey).** Show or hide the hyperlink to segmentation instructions for the DDC number (if applicable). • **Segmentation Numbers (not available for Abridged WebDewey).** Show or hide a segmented version of the DDC number (if applicable). **Default setting:** Show all record elements.

	Action
3	**Specify display of the Work Area box in DDC records, results lists, and user notes** On the Dewey Services Options screen, under DDC Record Options, select **Show** or **Hide** for the Work Area item: • Select **Show**, the default setting, to display the Work Area box in all appropriate screens. With the Work Area on, you can hide or show the Work Area box as needed by pressing <Alt><W>. • Select **Hide** to remove the Work Area box from Dewey Services screens. With the Work Area off, you cannot use <Alt><W> to show the Work Area box. **Default setting:** Show the Work Area box.
4	**Specify display of user notes and related functions** On the Dewey Services Options screen, under User Notes Options, set the following items: **Display of user notes in DDC records** • Under User Notes in a WebDewey Record, select **Show User Notes** or **Hide User Notes**. • Determines whether associated user notes appear within DDC records. If shown, user notes follow the Notes area that contains notes included in the DDC record. If the DDC record has no Notes area, user notes follow the hierarchy. • **Default setting:** Show User Notes. **Show institution or personal notes (requires site license)** • Under Show User Notes, select **Institution** or **Personal** or both. • Determines which user notes appear in DDC records. • **Default setting:** Show both institution notes and personal notes. **Default type of note to create (requires site license)** • Under Default Type of Note, select **Institution** or **Personal**. • When you create a user note, the specified type is selected in the blank note workform. You can change the type if appropriate. • **Default setting:** Personal.

	Action
5	**Set up link to library OPAC for automatic Dewey number searching** Allows you to send a DDC number search to a local catalog from within WebDewey or Abridged WebDewey. Under **OPAC Options**, specify the URL required to perform a call number search in one or two local library catalog(s). 1. In the first input box, type the complete URL for searching the call number index in the Web-accessible catalog you want to make the default for automatic searching. 2. **Optional** Use the second input box to specify the URL for call number searching in an alternative local catalog. 3. Designate the default local catalog for OPAC searching. Select one of the buttons to the left of the input boxes. 4. Test each link from the Options screen. In the **DDC#** box, type a Dewey number. Use a number you expect to find in the target catalog. Then click the **Test** button. 5. **Successful link.** If the test search is successful, click **Save My Default** (at the top or bottom of the screen) to complete setup. **Unsuccessful link.** If the test fails, check the URL for errors. For troubleshooting help, click **More details** in the Quick Tip next to the OPAC Options. You may also need to consult your system administrator for assistance. Be sure to retest the URL each time you modify it, and to click **Save My Default** when finished. Once you set up the link to your OPAC: • The Schedule record screen includes a button labeled **OPAC** (next to the **Browse** button). Click the button (or press <Alt></>) to search for the DDC number in your local catalog. • The **No Records Found** screen includes a button labeled **Search OPAC for Dewey Number**. Click the button (or press <Alt></>) to retry the unsuccessful DDC number search in your local catalog. **Example:** Your catalog may contain a built number not available in Dewey Services. **Problems with popup blockers** • Software that blocks display of popup advertisements from Web sites can interfere with OPAC searching from within Dewey Services. OPAC search results appear in a new browser window, which the popup blocker prevents from opening. • For best results while using Dewey Services (or any part of Connexion browser), **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 and** from the URL used to link to your local library catalog. • For more information, click **More details** in the Quick Tip next to the OPAC Options.

	Action
6	**Specify start page for new session: Dewey-only or cataloging** Under New Session Options, set the following items: • **Dewey-Only Session Start Page** Select the screen you want displayed immediately after you start a new Dewey-only session from a cataloging session. — **Choices** (available options determined by your subscription): Search WebDewey, Browse WebDewey, Search Abridged WebDewey, and Browse Abridged WebDewey. — **Default setting:** Search WebDewey (Search Abridged WebDewey if you subscribe to Abridged Webdewey only). • **Cataloging Session Start Page** Select the screen you want displayed immediately after you start a new cataloging session from a Dewey-only session. — **Choices**: Search WorldCat, Browse WorldCat, Search Authorities, and Browse Authorities. — **Default setting:** Search WorldCat.
7	**Change default or change for current session** • To use the settings for the current session only, at the top or bottom of the Dewey Services Options screen, click **Save for Session**. Or • To use the settings for future sessions, click **Save My Default**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	• Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

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 or Dedicated TCP/IP 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	If you designate your default authorization as **Dewey-Only** (in Local Browser Settings), the system automatically displays the Dewey-only logon screen. 1. Enter authorization and password: — **Default authorization and password.** Use the displayed authorization. Type the password if not already supplied. — **Multiple saved authorizations.** Select a saved authorization from the list. Type the password if not already supplied. — Or type an authorization number and password. 2. Click **Logon to Dewey-Only Session** or press <Enter>. **Result** • The system starts a Dewey-Only session and displays the Connexion home screen.
From Connexion cataloging logon screen	1. Under Related Links, click **Dewey-Only Session**. 2. Enter authorization and password: — **Default authorization and password.** Use the displayed authorization. Type the password if not already supplied. — **Multiple saved authorizations.** Select a saved authorization from the list. Type the password if not already supplied. — Or type an authorization number and password. 3. Click **Logon to Dewey-Only Session** or press <Enter>. **Result** • The system starts a Dewey-Only session and displays the Connexion home screen.

<table>
<tr><th>Start session</th><th>Procedure</th></tr>
<tr><td>From Connexion cataloging session
Shortcut Key
<Alt><N></td><td>• On the Dewey Services tab, under Show Options, click Start Dewey-Only.
Or press <Alt><N>.
Result
The system
• Opens a new browser window for the Dewey-Only session.
• Logs you on automatically to the new session.
• 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).
Specify starting screen for Dewey-Only session
• On the Dewey Services Options screen, under New Session Options, use the list labeled Dewey-Only Session Start Page to select the screen you want displayed immediately after you start a new Dewey-only session from a cataloging session.
Default setting: Search WebDewey (or Search Abridged WebDewey).
Choices (available options determined by your subscription): Search WebDewey, Browse WebDewey, Search Abridged WebDewey, and Browse Abridged WebDewey.</td></tr>
</table>

Start cataloging session

<table>
<tr><th>Start session</th><th>Procedure</th></tr>
<tr><td>Default cataloging session</td><td>Unless you designate your default authorization as Dewey-Only (in Local Browser Settings), the system automatically displays the logon screen for a cataloging session.
1. Enter authorization and password:
— Default authorization and password. Use the displayed authorization. Type the password if not already supplied.
— Multiple saved authorizations. Select a saved authorization from the list. Type the password if not already supplied.
— Or type an authorization number and password.
2. Click Logon or press <Enter>.
Result
• The system starts a cataloging session and displays the Connexion home screen.</td></tr>
</table>

Start session	Procedure
From Dewey-Only logon screen	1. Under Related Links, click **Cataloging Session**. 2. Enter authorization and password: — **Default authorization and password.** Use the displayed authorization. Type the password if not already supplied. — **Multiple saved authorizations.** Select a saved authorization from the list. Type the password if not already supplied. — Or type an authorization number and password. 3. Click **Logon** or press <Enter>. **Result** • The system starts a cataloging session and displays the Connexion home screen.
From Dewey-Only session **Shortcut Key** <Alt><N>	• On the Dewey Services tab, under Show Options, click **Start Cataloging**. Or press <Alt><N>. **Result** The system • Opens a new browser window for the Cataloging session. • Logs you on automatically to the new session. • 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). **Specify starting screen for Cataloging session** • On the Dewey Services Options screen, under New Session Options, use the list labeled **Cataloging Session Start Page** to select the screen you want displayed immediately after you start a new cataloging session from a Dewey-only session. **Default setting:** Search WorldCat. **Choices**: Search WorldCat, Browse WorldCat, Search Authorities, and Browse Authorities.

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.

13 Dewey Services tab options

Why use Dewey Services tab options?

- Streamline your work by hiding buttons and options for WebDewey or Abridged WebDewey functions you do not use.
- Simplify learning for new staff or limit staff access to selected functions.
- Control access to the Scan Title (Browse WorldCat) function to ensure appropriate use of this extra-cost search method.

Go to Dewey Services Tab Options screen

	Action
1	On the General tab, under Admin Options, click **Preferences**.
2	At the Preferences screen, click **General Options**.
3	On the General Options screen, click **Interface Customization Options**.
4	On the Interface Customization screen, find the section labeled **Select Service Tabs for Navigation Bar**.
5	In the list of service tabs, click **Dewey Services**.

Select Dewey Services tab options to show or hide

- To hide an option on the Dewey Services tab, clear the check box for that option.
- To hide a group of options (for example, all options for creating user notes), clear the check box for that Options list (for example, Create Options). Hiding an Options list hides the related button (for example, the Create button)

	Action
1	On the Dewey Services Tab Options screen, find the check box for the specific option or Options list you want to show or hide.
2	• Clear the check box to remove any option or Options list (and related button) from the Dewey Services tab. Or • Select the check box to restore any option or Options list (and related button) on the Dewey Services tab. **Default setting:** All check boxes selected. All available Options lists, buttons, and options appear on the Dewey Services tab.
3	Save changes as default or use for current session only. • Click **Save My Default** or **Save for Session**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	• Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.

Button	Purpose/Result
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

14 Set CatExpress options

CatExpress users only

You need to set CatExpress options only if:

- You are a CatExpress subscriber.
- Or you plan to use CatExpress for a portion of your copy cataloging.

Why set CatExpress options?

- Specify your preferred record view (MARC or Labeled).
- Specify a default call number type.
- Supply default information to streamline record editing:
  —Supply the holding library code you use most frequently.
  —Supply location information to be entered in field 852, subfield a.

Options for shared CatExpress authorizations

- Each CatExpress authorization has **one** set of default options stored on the CatExpress server.
- Users who share an authorization can establish a set of defaults for use by the group.
- Users who prefer different settings can modify the defaults after logging in and then click the **Save for Session** button to apply changes without affecting the group's shared settings.

How to set CatExpress options

	Action
1	**Go to the CatExpress Options screen** 1. On the General tab, under Admin Options, click **Preferences**. 2. At the Preferences screen, click **Express Options**. The Express Options screen appears.
2	**Specify record view** On the Express Options screen, under Default View, • Select **MARC** to view bibliographic records with MARC tags, subfield codes, etc., to identify elements of record content. Or • Select **Label** to view bibliographic records with descriptive labels for elements of record content. **Default setting:** MARC.
3	**Specify call number type** On the Express Options screen, under Default Call Number, • Select the type of call number you use most frequently: **Dewey** or **LC** (Library of Congress) or **NLM** (National Library of Medicine) or **Local** (local call number scheme or a local format for a standard scheme). Or • Select **None** if you want to select the call number type when editing each record. **Default setting:** None.

	Action
4	**Specify a label format** On the Express Options screen, under Default Label Format, enter the label format you use most frequently. **More information:** See section 2.7, Print Labels.
5	**Supply holding library code** On the Express Options screen, under Default Holding Library Code, enter the holding library code you use most frequently. The system supplies your default holding library code. Verify that the appropriate code appears (change it if necessary).
6	**Supply location information** On the Express Options screen, under Default Location, supply the text you want to appear in Location (852 $a) in bibliographic records. **Notes** • Location maps to field 852 (Location/Call Number) in OCLC-MARC records. This field may be used to record local item information. Not all library local systems can use 852 information. Confirm whether your system accepts 852 before using this field. This is an optional field. • When editing records, you may leave some or all of the Location data entry boxes blank. However, if you enter data in any other data entry box in 852 (Location), then you must enter a Location ($a) code.
7	**Change default or change for current session** • To use the CatExpress settings for the current session only, at the top or bottom of the Express Options screen, click **Save for Session**. • To use the settings for future sessions, click **Save My Default**.

Save changes, cancel, or restore original defaults

When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	• Save changes on this screen for the current session only. • When you log off, the system restores your previous default settings.
Save My Default	• Save changes on this screen for the current session and future sessions. • The new settings remain in effect until you change them.
Reset	• Restore original Connexion settings for options on this screen. • Reverse any changes you made during the current session or in previous sessions.
Cancel	• Reverse any changes you made since you accessed this screen during the current session. • Your previously saved settings remain in effect.

CatExpress reminders for Connexion users

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.

15 Set CatExpress export options

About export options

- **Export method. CatExpress subscribers.** If profiled for CatExpress export, you export bibliographic records to a file on the Connexion server, and then download the file to your workstation.
- **Records.** You export bibliographic records retrieved from WorldCat.
- **Single record export.** With CatExpress, you export one record at a time.
- **Format.** You export bibliographic records in MARC format.

Go to Export Options screen

	Action
1	On the General tab, click **Admin**.
2	At the Preferences screen, click **Export Options**.

Save changes, cancel, or restore original defaults

- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.
- The following table describes how the buttons work.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	Save changes on this screen for the current session only. When you log off, the system restores your previous default settings.
Save My Default	Save changes on this screen for the current session and future sessions. The new settings remain in effect until you change them.
Reset	Restore original Connexion settings for options on this screen. Reverse any changes you made during the current session or in previous sessions.
Cancel	Reverse any changes you made since you accessed this screen during the current session. Your previously saved settings remain in effect.

Set export options

Export files:

- Are created and stored on the Connexion server.
- **Allow appending until downloaded.** You can continue exporting to the same file until you download the file.
- Contain records that are exported either by any user from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file type is **Institution**. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to **Individual**.

- Remain available for download for 30 days from the file creation date. After 30 days, the system automatically deletes export files.

	Action	Result or Note
1	**Export File Name (Optional).** Specify a file name for downloaded export files. • On the Export Options screen, under Export File Name, type the file name and extension in the **File Name** text box. • Or keep the default file name, **export.dat**.	• **Name specified.** When you download an export file from the Download Export Files screen, the system automatically supplies the specified file name and extension. • **Default name.** If you do not specify a file name, the system supplies the default name, **export.dat**. • **Change name or extension during downloading.** If necessary, you can change the supplied file name before saving the file.
2	**Export File Type (Optional).** Specify the type of export file to use. On the Export Options screen, under Export File Type, select **Institution** (default setting) or **Individual**.	If you select: • **Institution export file (default setting).** Connexion creates export files that contain records exported by anyone logged on with an authorization number linked to your library's OCLC symbol. • **Individual export file.** Connexion creates export files that contain records exported by a user logged on with a specific authorization number.
3	**Fields to Delete on Export (Optional)** Specify the fields you want to remove from each bibliographic record before exporting the record for local use. On the Export Options screen, under Fields to Delete on Export, type the 3-digit MARC tag numbers for the fields to delete.	• To delete a single field, type the tag number in the text box. • To delete a range of fields, type the first and last tag to be removed, separated by a hyphen. • Separate single tags and tag ranges with commas. **Example:** In the Fields text box, type 920, 938, 945-999 to remove fields 920 and 938, and fields 945 through 999, from all exported bibliographic records.

Related topics