

Setup Worksheet for OCLC Connexion Client

This Setup Worksheet lists client settings, shows where to check or change them, and for some, provides space for noting preferences.

More details: See Client Help or *Set Options and Customize* at: <http://www.oclc.org/support/documentation/connexion/client/basics/options/>

Set Up Logon/Logoff		
Setting for...	Your setting	To enter setting in Connexion client, go to...
Logon access method	<input type="checkbox"/> OCLC Default <input type="checkbox"/> Other URL	Tools > Options > Access OCLC Default (http://connexion.oclc.org) suitable for most users
Logon authorization and password (general use)	Authorization _____ Password _____ Name _____	File > Logon (or <Ctrl><F1>) Enter authorization, password, and (optionally) name, or click Setup Authorizations and then enter to store as default.
Logon authorization/password (for specific local file)	Authorization _____ Password _____	File > Local File Manager (select local file; click Authorization) Note: If not supplied, the client uses authorization/password in Tools > Options > Authorizations .
Note on default authorization: A general-use or a local file-specific default authorization is required for batch processing.		
Customize logon	More authorization/password/names: Authorization _____ Password _____ Name _____ Authorization _____ Password _____ Name _____	Tools > Options > Authorization <ul style="list-style-type: none"> • Automatic logon. Select default authorization/password. • Multiple authorizations. Enter up to ten authorization/password combinations. Select from list at logon. • Descriptive names for authorizations. • Password-protected logon. Leave password blank to require password entry for each logon.
Logoff settings for session timer and warning	Number of minutes before logoff: _____ Warning message <input type="checkbox"/> On <input type="checkbox"/> Off Number of minutes to warn before logoff: _____	Tools > Options > General. Click Session Timer Options . <ul style="list-style-type: none"> • Select automatic logoff timing. Default: 39 min. Range: 5 to 39 min. • Select Warn for warning before logoff. Default: selected • Select number of minutes before logoff to display warning. Default: 5 min. (range: 1 to 5 min.)

Set Up Label Printing		
Setting for...	Your setting	To enter setting in Connexion client, go to...
Set label print options	Label printer _____ Label format: <input type="checkbox"/> SL4 <input type="checkbox"/> SLB <input type="checkbox"/> SL6 <input type="checkbox"/> SP1 Print offsets (inches or centimeters): _____ Top / Inches: _____ _____ Left / Centimeters: _____ Form: <input type="checkbox"/> Continuous <input type="checkbox"/> Sheet Tag on pocket label: _____ Prompt for options: <input type="checkbox"/> Yes <input type="checkbox"/> No Output to text file? Path & file name: _____	Tools > Options > Printing Tools > Options > Printing. Click Label Options .
Set fonts for printing labels	Options Fonts: Name of font _____ Point size _____ Boldface: <input type="checkbox"/> Yes <input type="checkbox"/> No	Tools > Options > Fonts <ul style="list-style-type: none"> • Select font options for printing labels. Defaults: <ul style="list-style-type: none"> — ALA BT Courier font — Point size 12 — Regular type - not boldface
Classification scheme for printing labels offline		Tools > Options > General. Click Offline Cataloging Options . Default: Library of Congress

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Set Up Export

To enter export settings in Connexion client, go to...




Tools > Options > Export. Under **Destination**, click **Create**; select an export destination listed below (destination setting is **required**).

Export to...Destination	Your setting	In the Export tab of the Options dialog...
File	Prompt for file name at export? <input type="checkbox"/> Yes <input type="checkbox"/> No Or File name (required) and path name _____ _____	<ul style="list-style-type: none"> Select Prompt for filename. Click OK. Or Create file: Select File. Click OK. Then: <ul style="list-style-type: none"> Select file location, or accept default: <i>X:\Program Files\OCLC\Connexion\Program</i> and enter file name (file extension <i>.dat</i>). Enter unique identifier for destination or accept default.
LPT Port (communications or printer port)	<input type="checkbox"/> LPT1 <input type="checkbox"/> LPT2 <input type="checkbox"/> PT3	<ul style="list-style-type: none"> Select LPT Port. Click OK, and follow prompts. Enter unique identifier for destination or accept default.
Connection (TCP/IP Internet or Asynchronous)	TCP/IP Host name (required) _____ Port (required) (Default: 23) _____ Use Telnet protocol? <input type="checkbox"/> Yes <input type="checkbox"/> No Asynchronous (All settings required) Port (Default: COM1) _____ Baud (Default: 9600) _____ Parity (Default: None) _____ Data bits (Default: 8) _____ Stop bits (Default: 1) _____ Flow control (Default: Software (XON/XOFF)) _____	<ul style="list-style-type: none"> Select Connection. Click OK. Then: <ul style="list-style-type: none"> Click Create twice (opens New Communications Settings dialog). Select Asynchronous or TCP/IP (internet). Click OK, and follow prompts. Enter unique identifier for destination or accept default.
OCLC Gateway Export (to your local system: displays messages back from your system)	(All settings required) Host name _____ Port _____ Options Select one: <input type="checkbox"/> Permanent connection <input type="checkbox"/> Notify Host Before Disconnect <input type="checkbox"/> Print Results to Default Printer Timeout (minutes): _____ Retries: _____ Delay: _____ Local System Authorization Select <i>Send Local System Logon Id and Password</i> and enter: Logon ID _____ Password _____ Select <i>Send User ID</i> and enter: User ID _____	<ul style="list-style-type: none"> Select OCLC Gateway Export. Follow prompts to enter settings. <ul style="list-style-type: none"> Supply host name of computer that runs your local library system. Example: Name - <i>lib.domain.edu</i> Numeric address - <i>123.456.7.89</i> Supply number of the port that provides direct access to your local system. Select Send Local System Logon ID and Password or Send User ID and supply information your local system requires for authorization. Enter unique identifier for destination or accept default.
Other Export options		
Select record standard and/or character set for exported records	In Tools > Options > Export , click Record Characteristics . Select MARC 21 (default) or Dublin Core Qualified (XML) record standard for exporting bibliographic records. Select the MARC-8 (default) or UTF-8 Unicode character set separately for exporting bibliographic and authority records. Note: Select UTF-8 Unicode for exporting records that contain Bengali, Devanagari, Tamil, and Thai scripts.	
Select option to print report	In Tools > Options > Export , click Display Report for Immediate Export Results check box. Report includes mapping errors if you export in Dublin Core. Print or copy data to retain. Report is not saved.	
Select fields to remove from exported records	In Tools > Options > Export , under Remove Fields , click Field Export Options . Enter field tags to delete from exported bibliographic records and/or enter tags to delete from authority records. Separate tag numbers with a comma or use a hyphen to indicate a range. Example: Enter 920, 938-999 .	

Note on exporting non-Latin script records: By default, exported records retain both Latin and non-Latin script fields, if present, with the Latin script data in tagged fields and non-Latin script data in corresponding MARC format 880 fields. See settings in **Tools > Options > International**.

Customize		
Setting to customize...	To do this...	Go to...
Actions on records	<ul style="list-style-type: none"> Disable Update and Produce for held records Warn before doing actions online 	Tools > Options > General. Click Action Options .
Batch settings Default logon authorization is required for batch. See p. 1.	Set options for: <ul style="list-style-type: none"> Batch searching Batch actions on records Batch report display and printing 	Tools > Options > Batch <ul style="list-style-type: none"> Maximum matched records to download (default: 1; range to 100) Retain search keys when search fails Delete attached local holdings records and/or attached institution records for Delete Holdings action (default: cleared) (setting is required for batch action) Perform export and/or label printing via batch (required; otherwise these actions always occur immediately) Display or print batch reports automatically upon completion (default: reports display but do not print)
Extract metadata (create records for electronic files)	Set options for extracting metadata from Web, Word, PDF, or MP3 files	Cataloging > Create > Extract Metadata For Web files only, create multiple records from linked files Click Settings : <ul style="list-style-type: none"> Display created records or save online or locally Create Dewey numbers, apply default constant data, define a My Status for records created Click Advanced Settings : <ul style="list-style-type: none"> Skip or follow URL redirects in Web files
Fields to transfer to derived records	Select fields you want to transfer to derived bibliographic records and/or institution records (IRs)	Tools > Options > Derive Record Default: fields 1XX through 8XX (bibliographic records) Default: 006, 007, 01X through 09X, 1XX through 9XX (IRs)
Fixed field display	Display at top or bottom of record or as variable field	View > OCLC Fixed Field > Top [or Bottom or Display as Variable Field] (default: Top)
	Use or hide fixed field drop-down lists of fixed field element values	Tools > Options > Record Display Default: Use dropdowns for fixed fields check box is selected
Import records in MARC-8 or UTF-8 Unicode	Select character set for importing	File > Import Records. Click Record Characteristics . Default: MARC-8
International cataloging	Go to: Tools > Options > International. Select options for: <ul style="list-style-type: none"> Type/order of data to retain in exported records; record sort order; include paired fields in workforms Language of interface: Chinese, English (default), German, Japanese, Korean, or Spanish Auto-transliterate Arabic script in Arabic or Persian WorldCat records retrieved interactively. Select fields to transliterate separately for Arabic and Persian records. 	
Keystroke shortcuts	View, copy, or print all keystrokes	View > Assigned Keys
	Assign or reassign keystrokes	Tools > Keymaps Select category, then item. In Press New Shortcut Key , type keys to assign
Local files	File > Local File Manager <ul style="list-style-type: none"> Assign authorization for a local file for interactive logon and batch processing: Click Authorization. Default: Client uses default setting from Tools > Options > Authorizations, if you set one. Configure paths for local files (click Configure Paths) or create local files (click Create File). Change the default local file: Select a file type and a file and click Set as Default. Select options for automatic backup: Click Auto Back Up. Default: Back up to file with same name plus *.bac 	
My Status—default	Enter default My Statuses to apply automatically	Tools > Options > My Status Enter for bibliographic or constant data records saved online or locally or for authority or constant data records saved locally.
Offline cataloging Required to work offline	<ul style="list-style-type: none"> Select classification scheme Enter holding library code and institution symbol Enter MARC organization code 	Tools > Options > General. Click Offline Cataloging Options . <ul style="list-style-type: none"> The client uses these settings when you catalog offline. When you are logged on, the client uses settings associated with your logon authorization.
Print records	Print to a text file	Tools > Options > Printing. Click the Print to File check box.
	Select font type and point size	Tools > Options > Fonts (defaults: Arial Unicode MS; pt. size: 9)
Print accessions lists	<ul style="list-style-type: none"> Print to a text file Print a tag on accessions lists 	Tools > Options > Printing. Click Accessions List . <ul style="list-style-type: none"> Select Output to File. Default file: Accessions.html Type a tag or a tag with subfield code (no spaces).

Customize

Setting to customize...	To do this...	Go to...
Record display	Select colors for (defaults shown): <ul style="list-style-type: none"> Field (cells)- <i>white</i> Window (background) - <i>gray</i> Text - <i>black</i> Invalid MARC-8 characters - <i>red</i> Converted MARC-8 CJK characters - <i>green</i> 	Tools > Options > Record Display <ul style="list-style-type: none"> Select a record element and click Define. Use standard Windows Color dialog to define a color. Repeat to select a color for each elements. (Bibliographic and authority record colors can be different.)
	Display all field data or truncate and use scroll bar to view Default: Cells expand as needed	Tools > Options > Record Display Select or clear View All Field Data .
Search WorldCat access to institution and SCIPRO records	<ul style="list-style-type: none"> Display institution records (IRs) for a single master WorldCat record Include IR indexes in searches Limit search to SCIPRO records 	Cataloging > Search > WorldCat ; click Settings . <ul style="list-style-type: none"> Select Display Institution Record(s) for single record. Select Include Institution Record indexes when searching WorldCat Select SCIPRO only.
Spell checker options	Select word types to skip	Tools > Options > Spelling ; click General Options
	Customize list of fields/subfields to include/skip	Tools > Options > Spelling ; click Fields to Check
	Edit the spell checker user dictionary	Tools > Options > Spelling ; click Edit User Dictionary
	Select main dictionary language	Tools > Options > Spelling ; Default: <i>English (United States)</i>
Startup action	Select an action or macro to run automatically when you start the client	Tools > Options > General . Click Startup Options . Select Run a macro or Start a client function . Select macro or function from dropdown list.
Text strings	<ul style="list-style-type: none"> Create and store text strings Insert using Apply button, or assign to keystroke or user tool Print list of text strings 	Tools > Text Strings <ul style="list-style-type: none"> To create, click Add, enter description & text string, click OK. To apply, click Apply or click Keymaps or User Tools To print list, click Print.
	Alternative: Use the text strings quick tool on the toolbar.	
Toolbar	Show or hide any or all three toolbars Default: All toolbars show	View > Toolbars > Client Toolbar click or [WorldCat Quick Search] or [Quick Tools]
	Add or delete buttons from the toolbar or restore default toolbar	Tools > Toolbar Editor <ul style="list-style-type: none"> Drag and drop a button onto the toolbar or vice versa. To restore default toolbar: Click Reset.
	Set button size to standard or large	Tools > Options > Toolbar <ul style="list-style-type: none"> Select: Standard (19x17 pixels) (default) or Large (38x34 pixels)
	Display toolbar on one line or two	Click the arrow at the far right end of the toolbar. Click Show buttons on two rows or Show buttons on one row .
User profiles	Create, select, or delete user profiles for changing to a different set of options and customizations	Tools > Profiles Default settings: Stored in: X:\Documents and Settings\user name\Application Data\OCLC\Connex\Profiles\MyProfile
User tools (up to 10)	<ul style="list-style-type: none"> Assign menu items, characters, text strings, macros to tools Customize tool description for popup tool tip or name on menu 	Tools > User Tools > Assign Select category and item in list. Select user tool. Click Assign . Click Modify Description : Enter a description.
	Alternative: Use the user tools quick tool on the toolbar.	
Validation level options	Set for bibliographic master records set holdings & export actions, institution record add & replace actions, authority record export action	Tools > Options > General . Click Validation Level Options . For bibliographic master record set holdings & export and for institution record add & replace, select Structure (default) , Basic , or Full . For export (all record types), select None (default) , Basic , or Full .
WorldCat index lists	Switch between selected (short) or complete index lists or customize short index lists	Cataloging > Search > WorldCat [or Browse > Worldcat] Click  to expand a list,  to return to short list, or  to customize short list.
WorldCat search results	Change default display to full record, brief list, or truncated list	Cataloging > Search > WorldCat . Click Settings . Click a button under Display Search Results .
WorldCat quick search toolbar	Alternative to using Cataloging > Search > WorldCat:	Enter a WorldCat command line search or browse in the toolbar.
Z39.50 access to integrated local system (ILS)	<ul style="list-style-type: none"> Set up Z39.50 connection to your ILS Connect, retrieve, import a record 	Set up: Tools > Options > Z39.50 Connect and retrieve a record: Tools > Options > Connect [or Search]