

# Using Connexion macros to automate workflows

## Presentation summary

Casey Mullin from Western Washington University presented on learning the basics of OML and writing your own macros. Casey provided an outline for his crash course in OML showing the various resources used, such as Joel Hahn's tutorial "[OML for the Complete Beginner](#)" and [OCLC's Basics: Use Macros](#), and examples of macro code.

## Connexion update

### Presentation summary

David Whitehair from OCLC presented on updates for Connexion. A new Connexion client is coming soon! The new version will be updated to work better with Windows 10 and conforms to new security standards. It will also include updated online documentation, removes updated obsolete functionality (e.g., GLIMIR options, Institution Records, and more), and automatically converts macros to 64-bit compatibility. It is yet to be decided what other bug fixes will be included and updates will be provided as to what will be included closer to the release. As in the past, an early adopter field test is planned for May/June 2021. Libraries that participated in the past early adopter field test will be contacted but also looking for additional libraries who use the following functionality: network-shared local files, macros, label printing, and CJK e-dictionary. The expected release is scheduled for July/August of 2021. Time will be given for libraries to upgrade, and support for older versions will be discontinued in 2022 with a minimum of 3 months advance notice. More information will be provided as the time gets closer.

David spoke about changes coming to the Message of the Day in the next couple of months. The message, as it currently stands, will go away and be replaced by a static Welcome Message. News posts from Cataloging and Metadata community will be used for ongoing announcements in its place.

David also suggests that if you are a Connexion browser user, to look at [WorldShare Record Manager](#), as it might better meet your needs. An upcoming virtual meeting will include various Record Manager libraries that will share the difference of what they're doing using Record Manger instead of Connexion browser. Connexion browser, WorldShare Record Manger, and Connexion client all use the same online save file making it very easy to move records between the three systems, but Record Manger might provide more functionality. More information on the virtual meeting will be coming soon.

## Member Questions

**Question: Can macros be created for Record Manager?**

Answer: No, macros are not supported within Record Manager. There is a built-in core functionality that does similar things for which people were creating macros for.

**Question: I use the Connexion website, does that affect its use? (Interpretation: Can you use macros in the Connexion browser?)**

Answer: The Connexion browser and WorldShare Record Manager do not support macros. They are only in the Windows-based Connexion client.

**Question: Aren't Institution Records a legacy feature from RLN?**

Answer: They were, and they were added into Connexion client, and then they were discontinued. That is why they will be removed from the Connexion client interface.

**Question: Will the messages (presumably Message of the Day) be available via RSS?**

Answer: No.

**Question: Possibly premature, but is there a roadmap for future Connexion development?**

Answer: Not at this time. Currently focused on changes mentioned during the presentation, and those changes will be announced upon release.

**Question: Who should we contact at OCLC for help with OCLC Macro creation?**

Answer: Please contact [OCLC Support](#) for help troubleshooting OCLC macro creation issues. In addition, see additional [Connexion client macro resources](#) on the OCLC web site.

**Question: Any update to OML itself in Connexion 3.0?**

Answer: No updates are planned for the OCLC Macro Language with Connexion 3.0.

**Question: Will Connexion client macro be [upgraded] to use with Record Manager as API tool?**

Answer: Record Manager will not integrate the Connexion client macro functionality. Instead, many features have been incorporated into Record Manager to help with cataloging process, such as Create 830, Enhance 505, Generate 043, and more available from the Advanced Action menu.

**Question: Will import profiles using the OCLC Gateway be affected in any way? We export from OCLC into Alma.**

Answer: Connexion client 3.0 will not impact OCLC Gateway export. This functionality will continue to work as it does with the current versions of Connexion client.

**Question: Will/can the updated Connexion client allow an option for \$0 URIs to be exported for controlled name and subject headings (as is possible with Record Manager)?**

Answer: The advanced functionality for exporting \$0 URIs will not be added to Connexion client 3.0 at this time. You can export that data using Record Manager or Collection Manager.

**Question: Will new Connexion client 3.0 provide access to LHRs?**

Answer: Access to Local Holdings Records (LHRs) will not be added to Connexion client 3.0. You can continue to manage LHRs using Connexion browser or Record Manager, or you can load them from your local system via a Data Sync collection within Collection Manager.

**Question: What is the authority module in the new Connexion?**

Answer: There are no changes to the authority functionality in the new version of the Connexion client. You can continue to use the same authority functionality currently supported in Connexion client.

**Question: Will there be a Mac version of the Connexion client?**

Answer: OCLC does not plan to offer a Mac version of Connexion client. See "[How to run Connexion client on a Mac](#)" for information on running the Windows version of Connexion client on a Mac.

**Question: Are records on Connexion purged at some point? Did control number searches and the records weren't available anymore. Don't records stay in the database?**

Answer: There are three cases when a record is removed from the WorldCat: 1. records merged, 2. older vendor records for items that were never published, and 3. requests from institutions. In case 1, a duplicate record that will be subsumed by another record will be deleted, but the control number of the deleted record will be added to field 019 in the retained record. Control numbers in field 019 are included in a control number search. In cases 2 & 3, the records are deleted from WorldCat and the control number can no longer be searched. The resource itself no longer exists (e.g. a thesis that was withdrawn by a university) or the resource never existed (e.g. an item that was supposed to be published but was not). More information about deleting records can be found in Bibliographic Formats and Standards section, [5.5 Requesting Changes to Records](#).

**Question: I am attending ALA Midwinter's virtual conference starting next weekend. Will you be a part of a session/roundtable during the conference?**

Answer: Cynthia Whitacre will be speaking on our Cyrillic script project during the [ACRL Technical Services Interest Group Forum](#). Nathan Putnam will be speaking at the Library of Congress BIBFRAME Update Forum on OCLC's work with BIBFRAME (see cataloging listservs for the announcement). He will also be speaking at the CORE Linked Data interest group meeting titled Troubleshooting Linked Data Authority Records during the [CORE Interest Group Week in early February](#). And finally, the linked data round table that is usually held during the Midwinter Meeting, will be held virtual in March. More details about this soon.