

## 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 ( <a href="http://connexion.oclc.org">http://connexion.oclc.org</a> ) 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 <b>Setup Authorizations</b> and then enter to store as default.
Logon authorization/password (for specific local file)	Authorization _____ Password _____	File > <b>Local File Manager</b> (select local file; click <b>Authorization</b> ) <b>Note:</b> If not supplied, the client uses authorization/password in Tools > Options > Authorizations.
<b>Note on default authorization:</b> A general-use or a local file-specific default authorization is <b>required</b> for batch processing.		
Customize logon	More authorization/password/names:  Authorization _____ Password _____ Name _____  Authorization _____ Password _____ Name _____	Tools > Options > Authorization <ul style="list-style-type: none"> <li>• Automatic logon. Select default authorization/password.</li> <li>• Multiple authorizations. Enter up to ten authorization/password combinations. Select from list at logon.</li> <li>• Descriptive names for authorizations.</li> <li>• Password-protected logon. Leave password blank to require password entry for each logon.</li> </ul>
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 <b>Session Timer Options</b> . <ul style="list-style-type: none"> <li>• Select automatic logoff timing. <b>Default:</b> 39 min. <b>Range:</b> 5 to 39 min.</li> <li>• Select <b>Warn</b> for warning before logoff. <b>Default:</b> selected</li> <li>• Select number of minutes before logoff to display warning. <b>Default:</b> 5 min. (range: 1 to 5 min.)</li> </ul>

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): <input type="checkbox"/> Top / Inches: _____ <input type="checkbox"/> 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 <b>Label Options</b> .
Set fonts for printing labels	<b>Options Fonts:</b> Name of font _____ Point size _____ Boldface: <input type="checkbox"/> Yes <input type="checkbox"/> No	Tools > Options > Fonts <ul style="list-style-type: none"> <li>• Select font options for printing labels.</li> </ul> <b>Defaults:</b> <input type="checkbox"/> ALA BT Courier font <input type="checkbox"/> Point size 12 <input type="checkbox"/> Regular type - not boldface
Classification scheme for printing labels offline		Tools > Options > General. Click <b>Offline Cataloging Options</b> . <b>Default:</b> 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 ( <b>required</b> ) and path name _____ _____	<ul style="list-style-type: none"> <li>Select <b>Prompt for filename</b>. Click <b>OK</b>. Or</li> <li>Create file: Select <b>File</b>. Click <b>OK</b>. Then:                             <ul style="list-style-type: none"> <li>Select file location, or accept default: <i>X:\Program Files\OCLC\Connexion\Program</i> and enter file name (file extension <i>.dat</i>).</li> <li>Enter unique identifier for destination or accept default.</li> </ul> </li> </ul>
LPT Port (communications or printer port)	<input type="checkbox"/> LPT1 <input type="checkbox"/> LPT2 <input type="checkbox"/> PT3	<ul style="list-style-type: none"> <li>Select <b>LPT Port</b>. Click <b>OK</b>, and follow prompts.</li> <li>Enter unique identifier for destination or accept default.</li> </ul>
Connection (TCP/IP Internet or Asynchronous)	<b>TCP/IP</b> Host name ( <b>required</b> ) _____ Port ( <b>required</b> ) (Default: 23) _____ Use Telnet protocol? <input type="checkbox"/> Yes <input type="checkbox"/> No  <b>Asynchronous</b> (All settings <b>required</b> ) Port (Default: <i>COM1</i> ) _____ Baud (Default: <i>9600</i> ) _____ Parity (Default: <i>None</i> ) _____ Data bits (Default: <i>8</i> ) _____ Stop bits (Default: <i>1</i> ) _____ Flow control (Default: <i>Software (XON/XOFF)</i> ) _____	<ul style="list-style-type: none"> <li>Select <b>Connection</b>. Click <b>OK</b>. Then:                             <ul style="list-style-type: none"> <li>Click <b>Create</b> twice (opens New Communications Settings dialog).</li> <li>Select <b>Asynchronous</b> or <b>TCP/IP (internet)</b>. Click <b>OK</b>, and follow prompts.</li> <li>Enter unique identifier for destination or accept default.</li> </ul> </li> </ul>
OCLC Gateway Export (to your local system: displays messages back from your system)	(All settings <b>required</b> ) Host name _____ Port _____ <b>Options</b> 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: _____ <b>Local System Authorization</b> 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"> <li>Select <b>OCLC Gateway Export</b>. Follow prompts to enter settings.                             <ul style="list-style-type: none"> <li>Supply host name of computer that runs your local library system. <b>Example:</b> Name - <i>lib.domain.edu</i> Numeric address - <i>123.456.7.89</i></li> <li>Supply number of the port that provides direct access to your local system.</li> <li>Select <b>Send Local System Logon ID and Password</b> or <b>Send User ID</b> and supply information your local system requires for authorization.</li> </ul> </li> <li>Enter unique identifier for destination or accept default.</li> </ul>




### Other Export options

Select record standard and character set for exported records	In <b>Tools &gt; Options &gt; Export</b> , click <b>Record Characteristics</b> . Select <b>MARC 21 (default)</b> or <b>Dublin Core Qualified, Dublin Core Simple, OCLC Dublin Core Qualified, OCLC Dublin Core Qualified, or MARC XML record standard</b> for exporting bibliographic records. Select the <b>MARC-8 (default)</b> or <b>UTF-8 Unicode character set</b> separately for exporting bibliographic and authority records. <b>Note:</b> Always select UTF-8 Unicode for exporting records that contain Bengali, Devanagari, Tamil, and Thai scripts.
Select fields to remove from exported records	In <b>Tools &gt; Options &gt; Export</b> , under <b>Remove Fields</b> , click <b>Field Export Options</b> . 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. <b>Example:</b> Enter <b>920, 938-999</b> .
Select Export options	In <b>Tools &gt; Options &gt; Export</b> : Click <b>Allow export of workforms</b> check box. Allows export of bibliographic and authority workforms from any type of save file. Click <b>Display report for immediate export results</b> check box. Print or copy data to retain. Report is not saved. Click <b>Warn before exporting bibliographic records that include unlinked non-Latin script fields</b> check box.

**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"> <li>Disable <b>Update</b> and <b>Produce</b> for held records</li> <li>Warn before doing actions online</li> </ul>	Tools > Options > General. Click <b>Action Options</b> .
Batch settings  Default logon authorization is <b>required</b> for batch. See p. 1.	Set options for: <ul style="list-style-type: none"> <li>Batch searching</li> <li>Batch actions on records</li> <li>Batch report display and printing</li> </ul>	Tools > Options > Batch <ul style="list-style-type: none"> <li>Maximum matched records to download (<b>default</b>: 1; range to 150)</li> <li>Retain search keys when search fails</li> <li>Perform export and/or label printing via batch (<b>required</b>; otherwise these actions always occur immediately)</li> <li>Display or print batch reports automatically upon completion (<b>default</b>: reports display but do not print)</li> </ul>
Classify	Set options for using the prototype OCLC Classify Web service ( <a href="http://classify.oclc.org/">http://classify.oclc.org/</a> ) via <b>Edit &gt; Classify</b> to get a class number	Tools > Options > Classify <ul style="list-style-type: none"> <li>Enter the classification scheme you use: Dewey or LC (<b>default</b>: LC)</li> <li>Enter a tag for the field to insert to contain the class number (<b>default</b>: 090)</li> </ul>
Extract metadata (create records for electronic files)	Set options for extracting metadata from Web, Word, PDF, or MP3 files	<b>Cataloging &gt; Create &gt; Extract Metadata</b> For Web files only, create multiple records from linked files Click <b>Settings</b> : <ul style="list-style-type: none"> <li>Display created records or save online or locally</li> <li>Create Dewey numbers, apply default constant data, define a My Status for records created</li> </ul> Click <b>Advanced Settings</b> : <ul style="list-style-type: none"> <li>Skip or follow URL redirects in Web files</li> </ul>
Fields to transfer to derived records	Select fields you want to transfer to derived bibliographic records	Tools > Options > <b>Derive Record</b> <b>Default</b> : fields 1XX through 8XX (bibliographic records) <b>Default</b> : 006, 007, 01X through 09X, 1XX through 9XX (IRs)
Fixed field display	Display at top or bottom of record or as variable field	<b>View &gt; OCLC Fixed Field &gt; Top</b> [or <b>Bottom</b> or <b>Display as Variable Field</b> ] ( <b>default</b> : Top)
	Use or hide fixed field drop-down lists of fixed field element values	Tools > Options > <b>Record Display</b> <b>Default</b> : <b>Use dropdowns for fixed fields</b> check box is selected
Import record standard and character set	Select MARC 21, Dublin Core Qualified, Dublin Core Simple, or MARC XML Select MARC-8 or UTF-8 Unicode	<b>File &gt; Import Records</b> . Click <b>Record Characteristics</b> . <b>Defaults</b> : MARC 21 and MARC-8
International cataloging	<b>Go to: Tools &gt; Options &gt; International</b> . Select options for: <ul style="list-style-type: none"> <li>Type/order of data to retain in exported records; record sort order; include paired fields in workforms</li> <li>Language of interface: Chinese, English (<b>default</b>), German, Japanese, Korean, or Spanish</li> <li>Auto-transliterate Arabic script in Arabic or Persian WorldCat records retrieved interactively. Select fields to transliterate separately for Arabic and Persian records.</li> </ul>	
Keystroke shortcuts	View, copy, or print all keystrokes	<b>View &gt; Assigned Keys</b>
	Assign or reassign keystrokes	Tools > <b>Keymaps</b> Select category, then item. In <b>Press New Shortcut Key</b> , type keys to assign
Local files	<b>File &gt; Local File Manager</b> <ul style="list-style-type: none"> <li>Assign authorization for a local file for interactive logon and batch processing: Click <b>Authorization</b>. <b>Default</b>: Client uses default setting from Tools &gt; Options &gt; <b>Authorizations</b>, if you set one.</li> <li>Configure paths for local files (click <b>Configure Paths</b>) or create local files (click <b>Create File</b>).</li> <li>Change the default local file: Select a file type and a file and click <b>Set as Default</b>.</li> <li>Select options for automatic backup: Click <b>Auto Back Up</b>. Back up to file with same name but with *.bac extension.</li> </ul>	
My Status–default	Enter default My Statuses to apply automatically	Tools > Options > <b>My Status</b> Enter for bibliographic or constant data records saved online or locally or for authority or constant data records saved locally.
Offline cataloging <b>Required</b> to work offline	<ul style="list-style-type: none"> <li>Select classification scheme</li> <li>Enter holding library code and institution symbol</li> <li>Enter MARC organization code</li> </ul>	Tools > Options > <b>General</b> . Click <b>Offline Cataloging Options</b> . <ul style="list-style-type: none"> <li>The client uses these settings when you catalog offline.</li> <li>When you are logged on, the client uses settings associated with your logon authorization.</li> </ul>
Print records	Print to a text file	Tools > Options > <b>Printing</b> . Click the <b>Print to File</b> check box.
	Select font type and point size	Tools > Options > <b>Fonts</b> ( <b>defaults</b> : <i>Arial Unicode MS</i> ; pt. size: 9)

## Customize

Setting to customize...	To do this...	Go to...
Print accessions lists	<ul style="list-style-type: none"> <li>Print to a text file</li> <li>Print a tag on accessions lists</li> </ul>	<b>Tools &gt; Options &gt; Printing.</b> Click <b>Accessions List</b> . <ul style="list-style-type: none"> <li>Select <b>Output to File</b>. <b>Default file:</b> Accessions.html</li> <li>Type a tag or a tag with subfield code (no spaces)</li> </ul>
RDA	<ul style="list-style-type: none"> <li>Enable RDA Toolkit field descriptions</li> <li>Choose IP authentication or enter authorization and password for logon</li> <li>Enable RDA workforms for creating records</li> </ul>	<b>Tools &gt; Options &gt; RDA</b> <ul style="list-style-type: none"> <li>RDA Toolkit field descriptions are available only to RDA Toolkit subscribers</li> <li>The client uses your IP authentication or authorization/password to log on to the Toolkit for displaying field descriptions</li> <li>Unless you select RDA workforms, you will use default AACR2 workforms</li> </ul>
Record display	Select colors for (defaults shown): <ul style="list-style-type: none"> <li>Field (cells)- <i>white</i></li> <li>Window (background) - <i>gray</i></li> <li>Text - <i>black</i></li> <li>Invalid MARC-8 characters - <i>red</i></li> <li>Converted MARC-8 CJK characters - <i>green</i></li> </ul>	<b>Tools &gt; Options &gt; Record Display</b> <ul style="list-style-type: none"> <li>Select a record element and click <b>Define</b>.</li> <li>Use standard Windows Color dialog to define a color.</li> <li>Repeat to select a color for each elements. (Bibliographic and authority record colors can be different.)</li> </ul>
	Display all field data or truncate and scroll <b>Default:</b> All field data displays	<b>Tools &gt; Options &gt; Record Display</b> Select or clear <b>View All Field Data</b> .
Search WorldCat access to institution and SCIPRO records	<ul style="list-style-type: none"> <li>Include IR indexes in searches</li> <li>Limit search to SCIPRO records</li> </ul>	<b>Cataloging &gt; Search &gt; WorldCat;</b> click <b>Settings</b> . <ul style="list-style-type: none"> <li>Select <b>Display Institution Record(s)</b> for single record.</li> <li>Select <b>Include Institution Record indexes when searching WorldCat</b></li> <li>Select <b>SCIPRO only</b>.</li> </ul>
Spell checker options	Select word types to skip	<b>Tools &gt; Options &gt; Spelling;</b> click <b>General Options</b>
	Customize fields/subfields to include or skip	<b>Tools &gt; Options &gt; Spelling;</b> click <b>Fields to Check</b>
	Edit the spell checker user dictionary	<b>Tools &gt; Options &gt; Spelling;</b> click <b>Edit User Dictionary</b>
	Select main dictionary language	<b>Tools &gt; Options &gt; Spelling;</b> <b>Default:</b> <i>English (United States)</i>
Startup action	Select an action or macro to run automatically when you start the client	<b>Tools &gt; Options &gt; General.</b> Click <b>Startup Options</b> . Select <b>Run a macro</b> or <b>Start a client function</b> . Choose from a list.
Text strings	<ul style="list-style-type: none"> <li>Create and store text strings</li> <li>Use <b>Apply</b> button or assign to keystroke or user tool</li> <li>Print list of text strings</li> </ul>	<b>Tools &gt; Text Strings</b> <ul style="list-style-type: none"> <li>To create, click <b>Add</b>, enter description &amp; text string, click <b>OK</b>.</li> <li>To apply, click <b>Apply</b> or click <b>Keymaps</b> or <b>User Tools</b></li> <li>To print list, click <b>Print</b>.</li> </ul>
Toolbar	Show or hide any or all three toolbars <b>Default:</b> All toolbars show	<b>View &gt; Toolbars &gt; Client Toolbar</b> click or [WorldCat Quick Search] or [Quick Tools]
	Add or delete buttons from the toolbar or restore default toolbar	<b>Tools &gt; Toolbar Editor</b> <ul style="list-style-type: none"> <li>Drag and drop a button onto the toolbar or vice versa.</li> <li>To restore default toolbar: Click <b>Reset</b>.</li> </ul>
	Set button size to standard or large	<b>Tools &gt; Options &gt; Toolbar</b> <ul style="list-style-type: none"> <li>Select: <b>Standard</b> (19x17 pixels) (default) or <b>Large</b> (38x34 pixels)</li> </ul>
	Display toolbar on one line or two	Click the arrow at the far right end of the toolbar. Click <b>Show buttons on two rows</b> or <b>Show buttons on one row</b> .
User profiles	Create, select, or delete user profiles for different option and customization settings	<b>Tools &gt; Profiles</b> <b>Default settings:</b> Stored in: X:\Documents and Settings\ <i>user name</i> \Application Data\OCLC\Connex\Profiles\MyProfile
User tools (up to 10)	<ul style="list-style-type: none"> <li>Assign menu items, characters, text strings, and macros to user tools</li> <li>Customize popup user tool descriptions</li> </ul>	<b>Tools &gt; User Tools &gt; Assign</b> Select category and item in list. Select user tool. Click <b>Assign</b> . Click <b>Modify Description</b> : Enter a description.
Validation level options	Set for bibliographic record set holdings and export actions, institution record add and replace actions, authority record export action	<b>Tools &gt; Options &gt; General.</b> Click <b>Validation Level Options</b> . Select <b>Structure (default)</b> , <b>Basic</b> , or <b>Full</b> . For export (all record types), select <b>None (default)</b> , <b>Basic</b> , or <b>Full</b> .
WorldCat index lists	Switch between selected (short) or complete index lists or customize short index lists	<b>Cataloging &gt; Search &gt; WorldCat [or Browse &gt; Worldcat]</b> Click  to expand a list,  to return to short list, or  to customize short list.
WorldCat search results	Select full record or brief or truncated list	<b>Cataloging &gt; Search &gt; WorldCat.</b> Click <b>Settings</b> . Display type: Click a button under <b>Display Search Results</b> .
WorldCat search results using GLIMIR	Display results in clusters of parallel records with different languages of cataloging	<b>Cataloging &gt; Search &gt; WorldCat</b> Click to select the <b>Display using GLIMIR clustering</b> check box.
WorldCat quick search toolbar	<b>Alternative to using Cataloging &gt; Search &gt; WorldCat:</b>	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"> <li>Set up Z39.50 connection to your ILS</li> <li>Connect, retrieve, import a record</li> </ul>	Set up: <b>Tools &gt; Options &gt; Z39.50</b> Connect and retrieve a record: <b>Tools &gt; Options &gt; Connect [or Search]</b>