Setup Worksheet for OCLC Connexion Browser

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

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

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

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

Logon Setup		
Setting to …	**Enter your information**	**Go to …**
Log on to Connexion	Authorization _____ (required) Password _____ (required)	Connexion Logon screen: 1 Point browser to: < http://connexion.oclc.org > General Access (most users) 2 Enter authorization and password
Set up automatic logon Or Enter up to 10 authorization/password combinations to select from a list at logon Or Enter authorization and password for Dewey-only access.	More authorization/passwords: Authorization _____ Password _____ Authorization _____ Password _____ Authorization _____ Password _____ Authorization _____ Password _____	1 On the Connexion Logon screen, click **Local Browser Settings** (link is below OCLC copyright information) 2 Enter more authorization/password combinations. 3 Enter a **Name** to identify each combination (Optional). 4 In the **Dewey-Only** column, type *Y* or *N* (Required). 5 Set a default authorization/password or select no default. 6 **Dewey-Only access.** For an authorization/password combination used to start a Dewey-Only session, type *Y* in the **Dewey-Only** column.
Export Setup		
Setting to …	**Enter your information**	**Go to …**
Export records	---	**General tab > Admin > Export Options**
Export to a file on your workstation	---	➢ On the Export Options screen, under Export Destination, select **Export to a File**
Export to TCP/IP connection **Note:** The Connexion browser does **not** support export via: • A communications or printer port • An OCLC Gateway connection (which displays messages back from your local system)	Host Name_____(required) Port number_____(required)	1 Under Export Destination, select **Export to a TCP/IP connection** 2 Under TCP/IP Connection Options, supply **host name** of the computer that runs your local library system (example: name *lib.domain.edu* or numeric address *123.456.7.89*) and **port number** of the port that provides direct access to your local system **Note:** If your local system is protected by a firewall, configure the firewall software to accept data from the following IP address: 132.174.100.234.
Other TCP/IP settings	Logon ID_____ Password_____ Or User ID_____	1 Under TCP/IP Local System User Info, click to select the appropriate check box to **Send Logon ID** or **Send User ID** to your local system 2 Enter the logon ID/password or the user ID your local system requires for authentication
Export multiple flagged records (Pre-select export format)	____None (prompt for each export) ____MARC ____Dublin Core HTML ____Dublin Core RDF	➢ Under Flagged Bibliographic Record Export Format, click to select a format **Note:** Allows you to skip the step of selecting format each time you export (or keep the default, None). If format is not selected here, you must specify format each time you export

Labels Setup		
Setting to …	**Enter your information**	**Go to …**
Print labels Connexion uses the OCLC Cataloging Label Program (V. 1.22 or higher)	Label Program installed? ____Yes ____ No	**1** Label Program home page on OCLC Web site at < http://www.oclc.org/label/ > **2** Click **Download Cataloging Label Program software**
Print single label (Using Label Program from within Connexion)	Label format: ____SL4 ____SLB ____SL6 ____SP1	In the Connexion browser: **General tab > Admin > Cataloging Options** ➢ Under Label Format, select a format
Print labels for groups of records downloaded and imported to the Label Program	Label format: ____SL4 ____SLB ____SL6 ____SP1	In the Label Program: ➢ On the Options menu, click **Format** and then click the format you want
Set print options in the Label Program	Printer: _____ Font type: _____ Font size: ____pt Form: ____Continuous ____Sheet Print offsets: ____Top ____Left	In the Label Program: ➢ On the Options menu, click **Print** **Note:** To print continuous labels in Windows NT (V. 4.0 or later), you must set up a custom label form to use with your pin-feed printer. For instructions, see documentation for the Label Program at < http://www.oclc.org/support/documentation/label/getting_started/#6 >
Turn off Label Program prompt to save each label from Connexion	Leave prompt on: ____ Turn prompt off: ____ (If on, prompt appears whether or not you edited the label)	In the Label Program, to **turn prompt off** if you do not need to save the labels (for example, to print later in batch): ➢ On the Options menu, click **Warn Before Closing Unsaved Label** if check mark appears (check mark shows prompt is on)

Keystroke Shortcuts	
Setting to …	**Go to … Enter your preferred assignments**
Customize keystroke shortcuts **Note:** Using these keystroke shortcuts is **optional**. These keystrokes work in supported versions of Netscape and Internet Explorer. You can customize by reassigning your most-used actions to keys you find most convenient. **Permanent keystrokes.** Connexion browser provides **permanently assigned** keystrokes for actions you can take on a bibliographic or authority record. To **view** permanent keystrokes for available actions, on a record screen press <Alt><K>. Permanent command keystrokes work with supported versions of Internet Explorer **only**.	**General tab > Admin > General Options > Keystroke Shortcut Options** ➢ Use or reassign any of the following 18 keystroke combinations to any Connexion browser actions or functions. To view all assignable actions and functions, on the Preferences/Keystroke Shortcut Options screen, scroll one of the lists next to a key assignment Browser keystrokes and default assignments: **Available Keystrokes** / **Your Preferred Assignment …** / **Default Assignment** <Ctrl><Shift><A> _____ Replace Record <Ctrl><Shift><C> _____ Apply Default Constant Data <Ctrl><Shift><D> _____ Derive New Record <Ctrl><Shift><E> _____ Export Record in MARC <Ctrl><Shift><F> _____ Flag Record <Ctrl><Shift><G> _____ Set as Default Constant Data <Ctrl><Shift><H> _____ Display Holdings <Ctrl><Shift><K> _____ Control All Headings and DDC <Ctrl><Shift><L> _____ Edit Record <Ctrl><Shift><M> _____ Lock WorldCat Record <Ctrl><Shift><P> _____ Produce and Update Holdings <Ctrl><Shift><Q> _____ Release Record Lock <Ctrl><Shift><R> _____ Reformat Record <Ctrl><Shift><S> _____ Save Record <Ctrl><Shift><U> _____ Update Holdings <Ctrl><Shift><V> _____ Validate Record <Ctrl><Shift><X> _____ Delete Save File Record <Ctrl><Shift><Z> _____ Unedit Record
Print a list of keystroke shortcuts for reference	**1** At the top or bottom of the Keystroke Shortcut Options screen, click **Print**. Or, on any screen, press <Shift><F7>. The list includes the keystrokes above and many more nonchangeable keystroke shortcuts you can use for searching and browsing, navigating, record action commands, and other special purposes such as entering diacritics. **2** In the Keystroke Shortcuts List popup window, click **Print** to confirm.