Record Manager setup worksheet for Connexion browser users

Use this setup worksheet to record your settings in Connexion browser and transfer them to WorldShare Record Manager.
Use this setup worksheet to record your settings in Connexion browser and transfer them to Record Manager. Any settings that are not on this worksheet are not applicable or have only one option in Record Manager.

Exporting records

**Connexion browser**

1. Sign in to Connexion browser.
2. Click the **General** tab.
3. Click the **Admin** button.
4. Click **Export** options.

**Record Manager**

1. Sign in to WorldShare and open Record Manager.
2. In the left navigation, click **Export Lists**.
3. From the Export Lists screen, click the **name** of a list to open it.

Export destination

- Export to a File
- Export to a TCP/IP Connection
Export destination

Export format

Record Manager

1. Sign in to WorldShare and open Record Manager.
2. In the left navigation, click User Preferences.
3. From the Preferences screen, click Exporting - Bibliographic Records to set your export preferences.
### General Export Preferences

<table>
<thead>
<tr>
<th>Format</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARC 21 with MARC-8</td>
<td></td>
</tr>
<tr>
<td>MARC 21 with MARC-8</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Exclude Data</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARC 21 with UTF-8 Unicode</td>
<td></td>
</tr>
<tr>
<td>MARCXML with UTF-8 Unicode</td>
<td></td>
</tr>
<tr>
<td>MARC 21 with MARC-8 and LHR</td>
<td></td>
</tr>
<tr>
<td>MARC 21 with UTF-8 Unicode and LHR</td>
<td></td>
</tr>
<tr>
<td>MARCXML with UTF-8 Unicode and LHR</td>
<td></td>
</tr>
<tr>
<td>Dublin Core Simple with UTF-8 Unicode</td>
<td></td>
</tr>
<tr>
<td>Dublin Core Qualified with UTF-8 Unicode</td>
<td></td>
</tr>
<tr>
<td>OCLC Dublin Core Simple with UTF-8 Unicode</td>
<td></td>
</tr>
<tr>
<td>OCLC Dublin Core Qualified with UTF-8 Unicode</td>
<td></td>
</tr>
<tr>
<td>MODS with UTF-8 Unicode</td>
<td></td>
</tr>
</tbody>
</table>

### Fields to delete/exclude data

**Bibliographic Record:**

**Authority Record:**
General Export Preferences

Format: MARC 21 with MARC-8

Exclude Data:

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Subfields</th>
</tr>
</thead>
<tbody>
<tr>
<td>245</td>
<td>1</td>
<td>0</td>
<td>a</td>
</tr>
<tr>
<td>245</td>
<td>1</td>
<td>0</td>
<td>b</td>
</tr>
</tbody>
</table>

TCP/IP connection options

TCP/IP Connection Options

- Host Name: Required
- Port Number: Required
### TCP/IP Export Preferences

<table>
<thead>
<tr>
<th>General</th>
<th>International</th>
<th>TCP/IP</th>
<th>Uniform Resource Identifiers (URIs)</th>
</tr>
</thead>
</table>

#### TCP/IP

- **Host Name**: 
- **Port Number**: 
- **Authentication**: None

#### TCP/IP local system user information

- Send Logon ID: 
- Logon ID: 
- Password: ...
- Send User ID: 
- User ID: 

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[Link to OCLC Help: Metadata Services/WorldShare Record Manager/Reference/Record_Manager_setup_works...](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Reference/Record_Manager_setup_works...)

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TCP/IP

Host Name

Port Number

Authentication

Login ID ▼
None
Login ID
User ID

ID

Password

Mask Password

Logon ID ____________________________
User

Login ID ____________________________
User

Password ____________________________