

Customizing the OCLC Connexion Client to Work for You

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Customizations

Easy Favorites

- Record Display customization
- WorldCat Quick Search
- Pin tool
- Tile Vertically

Toolbar Customization

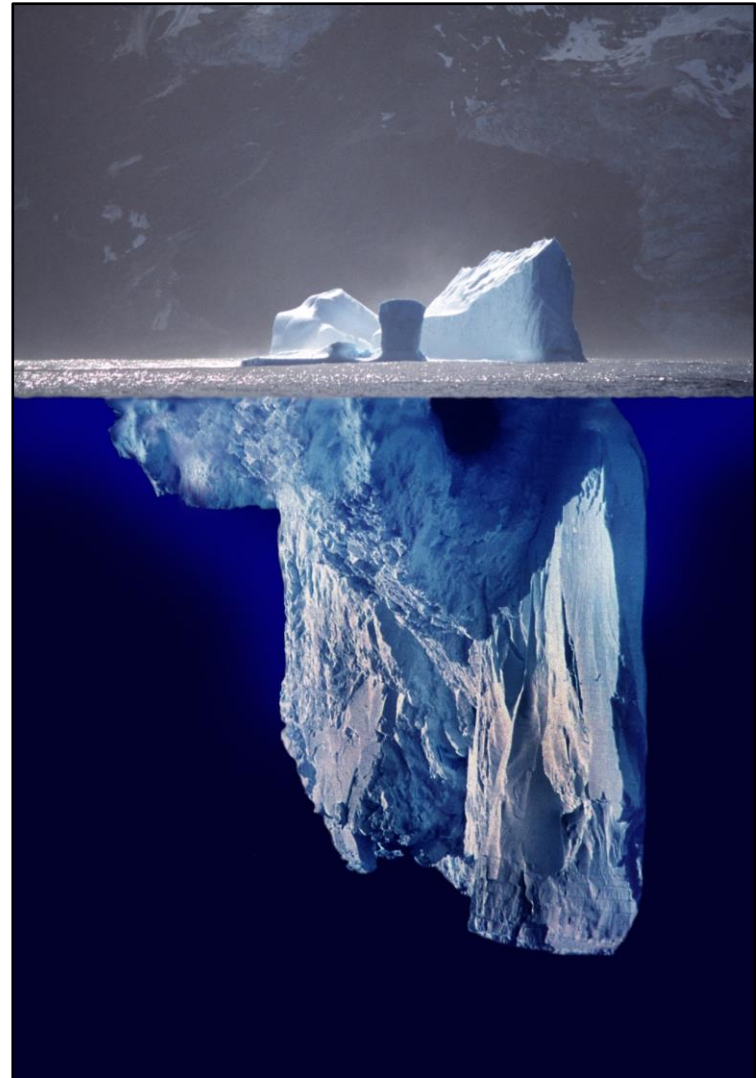
Constant Data

Text Strings

Macros

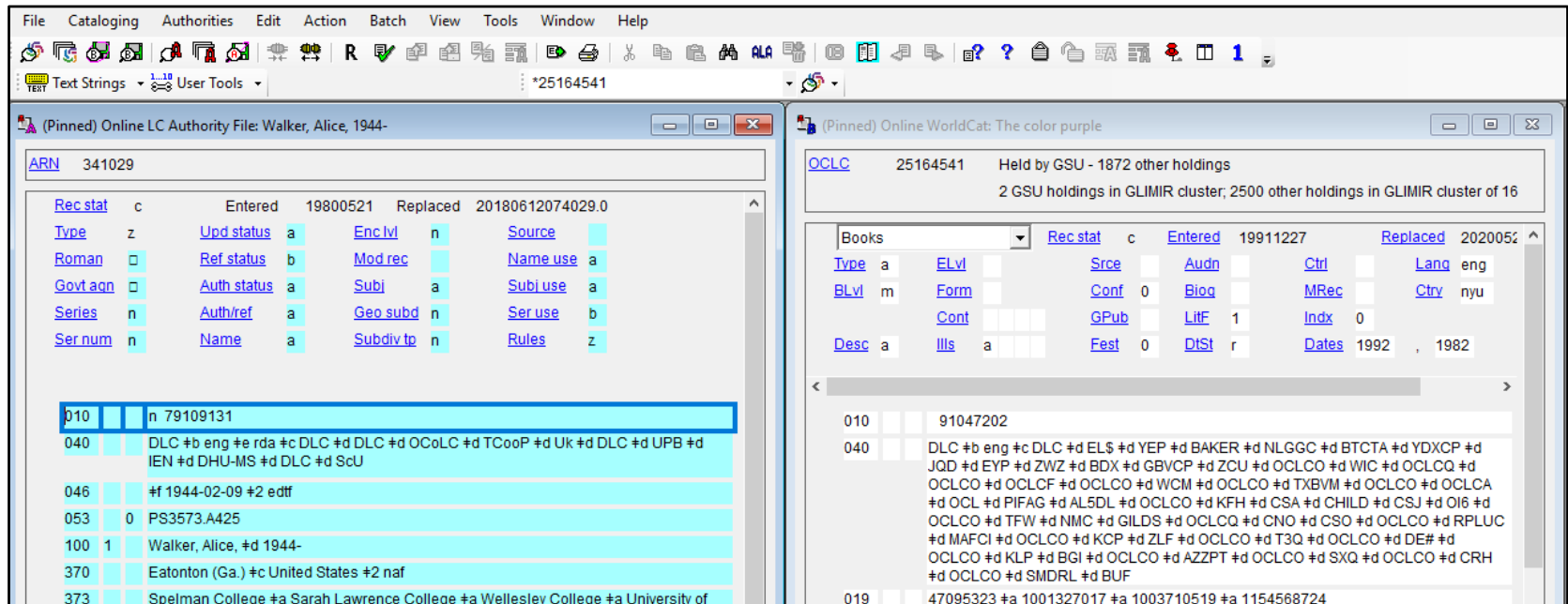
User Tools

Backup Customizations



Created by Uwe Kils (iceberg) and User:Wiska Bodo (sky). / CC BY-SA (<http://creativecommons.org/licenses/by-sa/3.0/>)

Easy Favorites



Partial view of Emily's Connexion Client screen. Authority record on left in blue and bib record on right in default white.

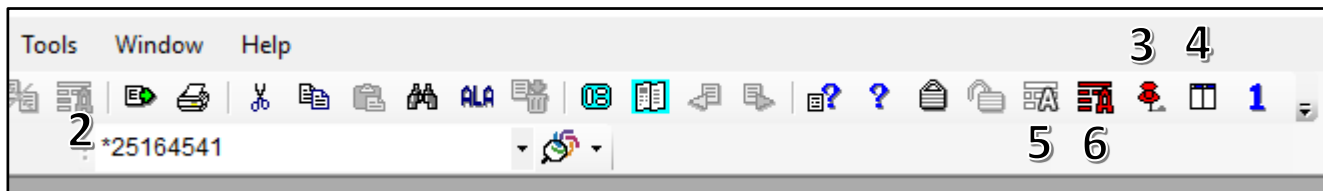
1 Distinguish Record Types by Color

- Visually distinguishes Authority records from Bibliographic records
- Toolbar Tab: **Tools** > **Options...** > **Record Display** tab >

Colors Element: [choose option] > **Define...** > [choose basic or custom color] > **OK**

- Example: Authority Text

Easy Favorites, continued



Partial view of Emily's Connexion Client Toolbar

2 WorldCat Quick Search box -default option

OCLC control number index	To find this number ...	Enter this search ...
OCLC control number (no:)	10998406	no:10998406 or *10998406 or #10998406
	Notes: <ul style="list-style-type: none"> • Command line/full syntax search: Precede with index label, asterisk (*), or number sign (#). • Keyword/Numeric guided search: Optional. Precede with * or # instead of selecting an index. Do not use the index label. 	

Source: OCLC Connexion: Searching WorldCat Quick Reference, page 3

Selected keyword indexes and search examples

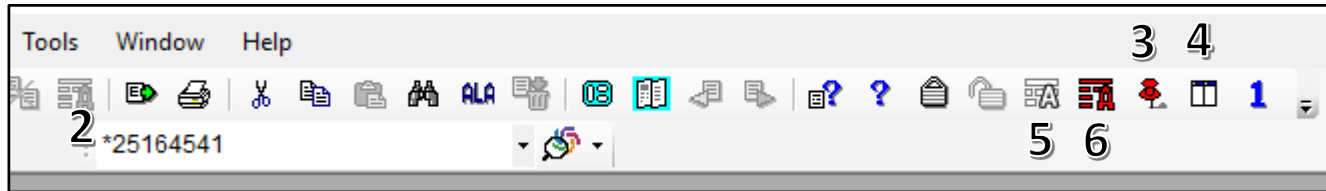
Keyword index	Label	Example
Corp/Conf Name	cn:	cn:enron
Corp/Conf Name Phrase	cn=	cn=enron corp
Corp/Conf Name Whole Phrase	cnw=	cnw=enron corp board of directors special investigative committee
Name	au:	au:kahlo
Name Whole Phrase	auw=	au=kahlo, frida 1910-1954
Personal Name	pn:	pn:salinger j d
Publisher	pb:	pb:thousand oaks
Series	se:	se:ergonomic
Series Phrase	se=	se=ergonomic management series
Subject Phrase	su=	su=aquatic ecosystems
Title	ti:	ti:gerontological
Title Phrase	ti=	ti=gerontological nursing

Source: OCLC Connexion: Searching WorldCat Quick Reference, page 4

OCLC Connexion Search Resources:

- [Bibliographic searching, Connexion client training website](#) Modules 2 and 7
- [OCLC Connexion: Searching WorldCat Quick Reference](#)

Easy Favorites, continued



Partial view of Emily's Connexion Client Toolbar

3 Pinned [Pin]

- Toolbar Tab: **View** > **Pinned**
- Shift+F4
- Display above is a toolbar customization

4 Tile Vertically

- Toolbar Tab: **Window** > **Tile Vertically**
- Side by side on a horizontal plain
- Alternative: Tile Horizontally
- Display above is a toolbar customization

5 Uncontrol All Headings

- Toolbar Tab: **Edit** > **Control Headings** > **Uncontrol All**
- Display above is a toolbar customization

6 Control All Headings

- Toolbar Tab: **Edit** > **Control Headings** > **All**
- Shift+F11
- Display above is a toolbar customization

Toolbar Customization

Purpose: Places a button/icon on your toolbar that links to your most heavily used menu commands and/or User Tools. In doing so, you avoid the cumbersome file navigation for frequently used commands.

- Some buttons are part of the default toolbar display and are removable
- Buttons, including those on display by default, can be reordered/reorganized

-Add a button:

Toolbar tab: **Tools** > **Toolbar Editor...** > **Record Display** tab > [select **Menu Item***] > click and drag **Menu Item** and drop on Toolbar

*Note: Menu Items are named according to the toolbar navigation trail for a specific command
They are organized alphabetically

Examples: Toolbar tab + Command
ViewPinned
View = toolbar tab Pinned = Command

Toolbar tab + Command + Subcommand
EditControlHeadingsAll
Edit = toolbar tab ControlHeadings = Command All = Subcommand

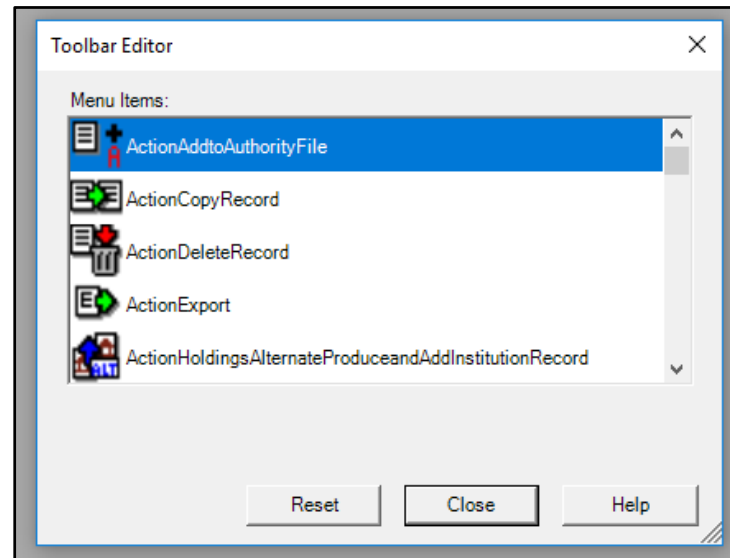
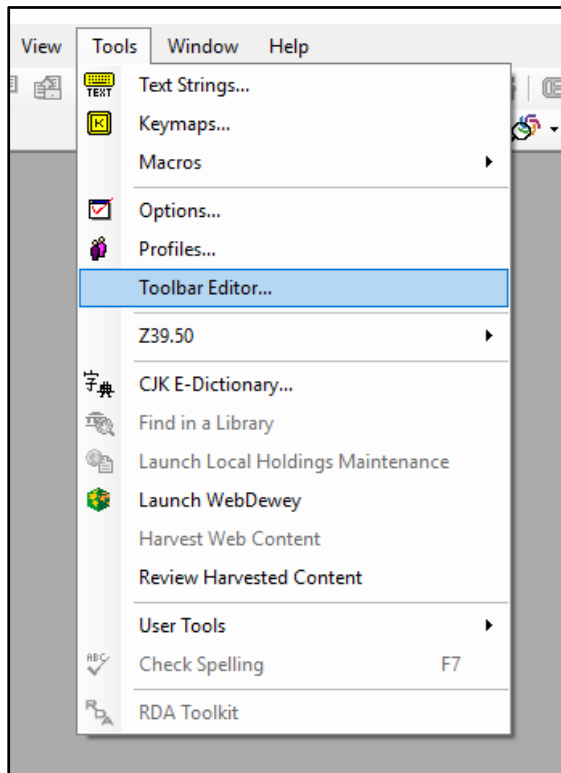
-Remove a button:

Toolbar tab: **Tools** > **Toolbar Editor...** > Hold down the Alt key on your keyboard while you click and drag the offending button from toolbar to the list of **Menu Items** and unclick, or drop within the box

-Relocate a button:

Hold down the Alt key on your keyboard while you click a toolbar button, then drag and drop it to a new location.

Toolbar customization, continued



To add a button to your toolbar, click and drag selected Menu Item to where you'd like it on the toolbar.

To remove a button from your toolbar (including default buttons), hold down the Alt key on your keyboard while you click and drag the button from toolbar to the list of Menu Items.

To rearrange buttons on your toolbar (including default buttons), hold down the Alt key while clicking and dragging the button to its new location.



OCLC Connexion Search Resources:

- [Add, remove, or change the position of buttons on the Connexion client toolbar, OCLC Connexion Troubleshooting](#) (2018)

Constant Data

Definition: A saved record template of set indicators, fields, etc. to be used when cataloging an item with those attributes. Once created, it can be shared with all users from your library.

Examples: Finding Aid template for use by non-cataloging staff
Apply 'closed caption' related fields to video records

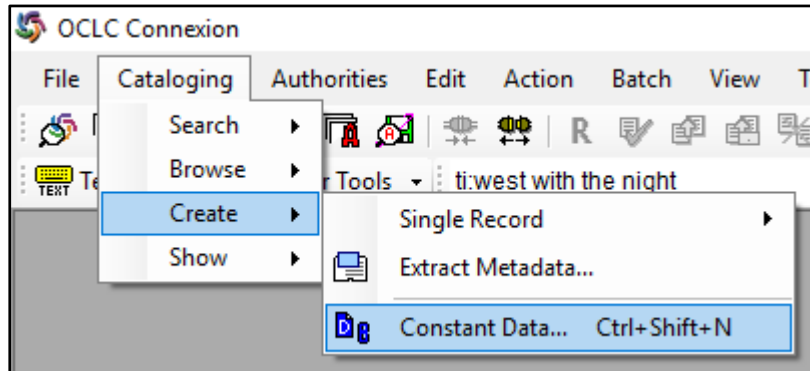
Purpose: Provide efficiency and consistency to your records

Features: User-created
Create from a blank workform, an existing bib record, or existing constant data
Use on fixed fields, variable fields or both
Save to local or online files
Applied to single or multiple record(s)

OCLC Constant Data Resources:

- [Cataloging: Use Bibliographic Constant Data, OCLC Connexion Client Guides](#) (2016)
- [Authorities: Use Authority Constant Data, OCLC Connexion Client Guides](#) (2006)
- [Automation and customization, Connexion client training website](#), Module 5
- [OCLC Connexion Client Cataloging Quick Reference](#), pages 4, 7, 8, 10, 11
- Tran, M. (2014). Create Constant Data in Connexion Client. *Connexion Client Training Videos Series*. Video retrieved from <https://www.youtube.com/watch?v=dyvGVUqHbqw>
- Tran, M. (2014). Apply Constant Data in Connexion Client. *Connexion Client Training Video Series*. Video retrieved from <https://www.youtube.com/watch?v=VrT2sWOyV6k>

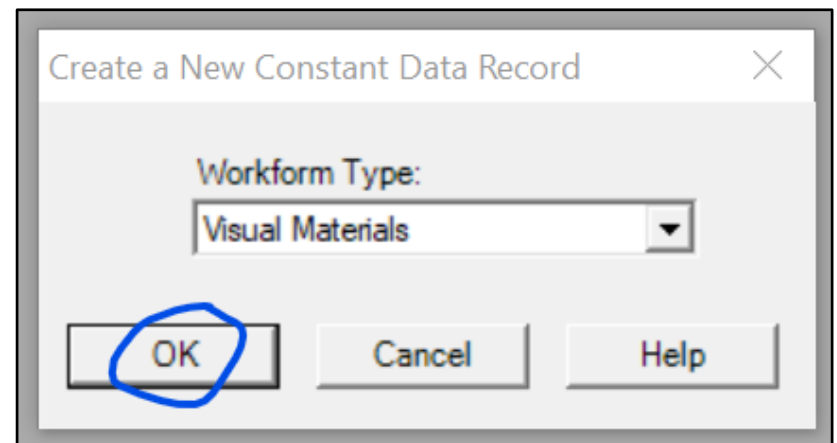
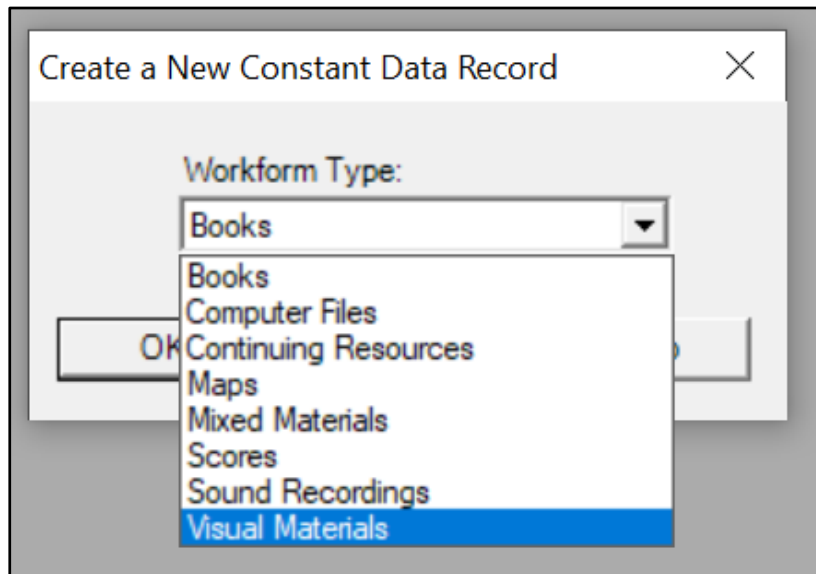
Constant Data, continued



Create New:

Toolbar tab: **Cataloging > Create > Constant Data...**

Select Workform Type from list of options > **OK**



Constant Data, continued

OCLC Connexion - [Bibliographic Constant Data Workform: Visual Materials]

File Cataloging Authorities Edit Action Batch View Tools Window Help

Text Strings 1-10 User Tools ti:"get out"

Visual Materials Rec stat n Entered 20200713

Type g ELvl ☐ Srce d Audn ☐ Ctrl ☐ Lang ☐
 BLvl m Form ☐ GPub ☐ Time ☐ MRec ☐ Ctry ☐
 Desc ☐ TMat ☐ Tech n DtSt ☐ Dates ☐

007		#b #d #e #f #g #h
02		
041	<input type="checkbox"/>	#h #j #g #m
050	<input type="checkbox"/>	
1	<input type="checkbox"/>	#e #4
245	<input type="checkbox"/>	#b #c
246	<input type="checkbox"/>	
26	<input type="checkbox"/>	#b #c
300		#b #c #e
336		#b #2
337		#b #2
338		#b #2
34		
490	<input type="checkbox"/>	#x #v

Bibliographic Constant Data Workform opens

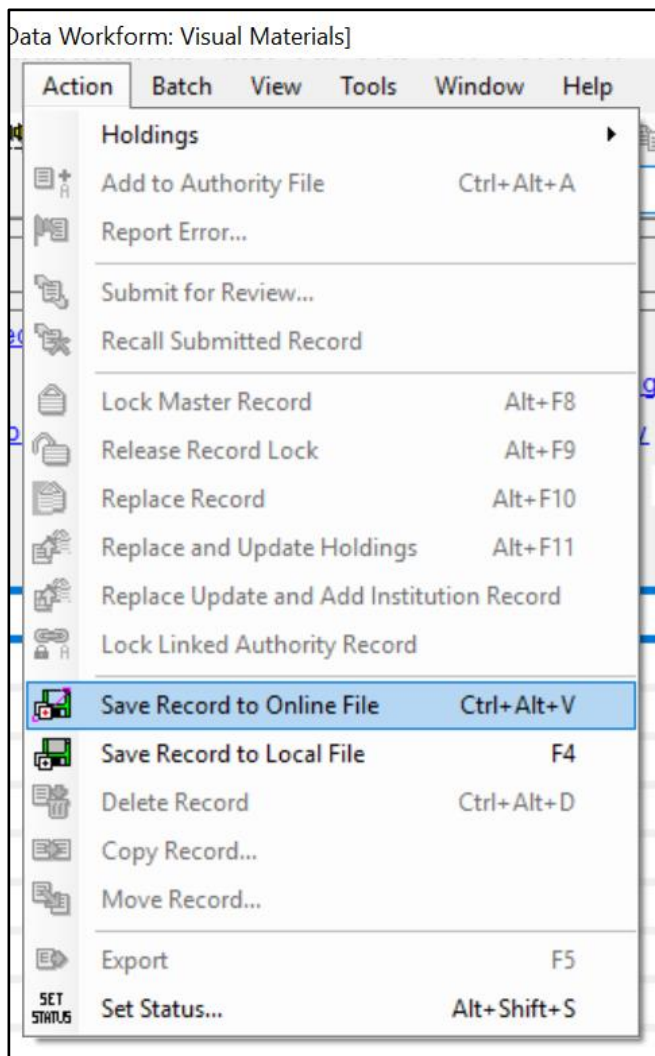
*Note:

- The workform type selected on previous prompt provides basic coding for the record
- Both fixed and variable fields can be edited
- Use * in a fixed field if you want the data in the edited bib record to be used

Example: Lang / Ctry / DtSt / Dates

Once edits made, click **Reformat** (**Edit > Reformat** or R toolbar button) to remove all empty/extraneous fields.

Constant Data, continued

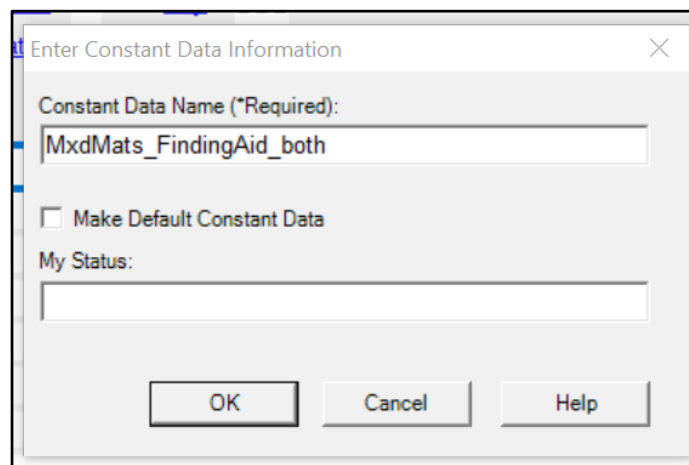


Once workform is complete, save the file

Toolbar tab: **Action > Save Record to Online File**
OR

Toolbar tab: **Action > Save Record to Local File**

Create **Constant Data Name > OK**



***Note**

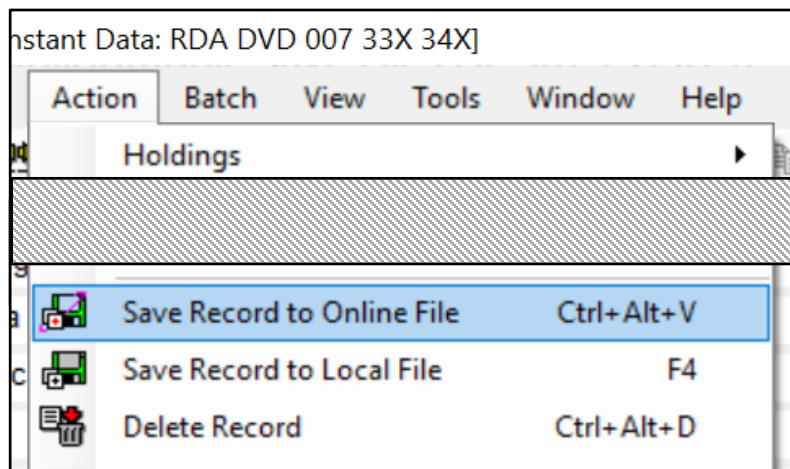
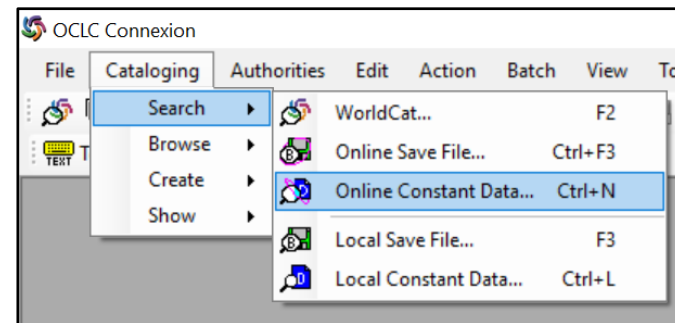
- Name it something meaningful to you and others (if sharing)
- Consider including Workform type and whether it includes fixed, variable, or both field types. This will be helpful when you apply constant data to a record in six months and your memory isn't so good on what's included in the workform.

Constant Data, continued

Search for Constant Data:

Toolbar tab: **Cataloging > Search > Online Constant Data...** or **Local Constant Data...**

Double-click an existing constant data workform to open and edit.



Save an edited workform:

Toolbar Tab: **Action > Save Record to Online File** or **Save Record to Local File**
File is saved.

Delete an existing workform:

Select workform from list > Toolbar tab: **Action > Delete Record**

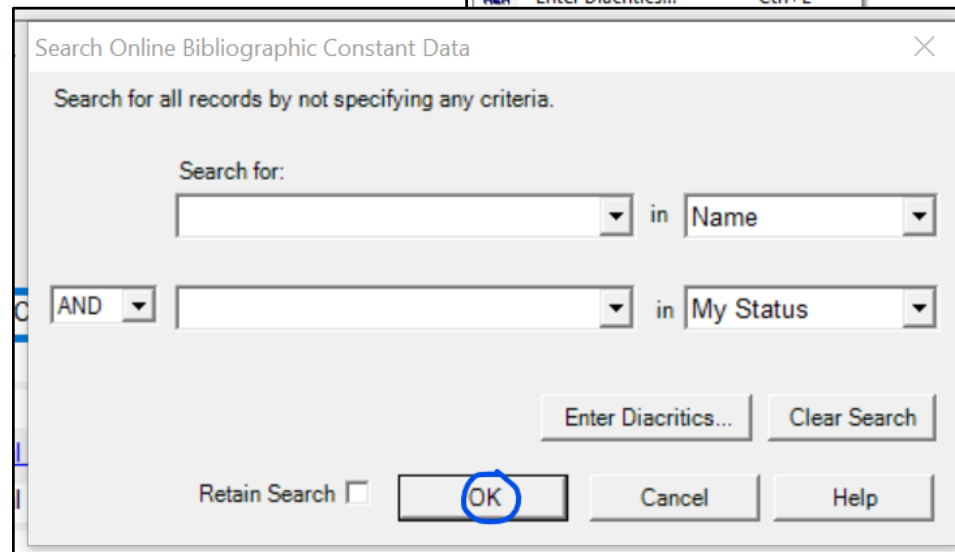
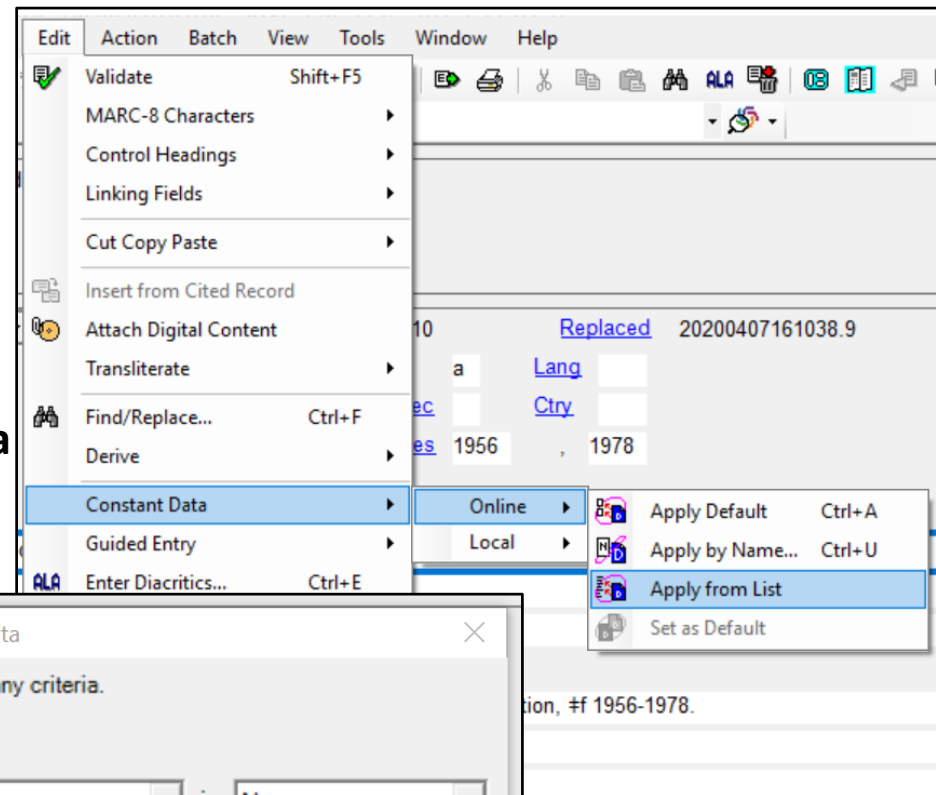
Constant Data, continued

To apply to a record:

Open bib record

Toolbar tab: **Edit > Constant Data >**
Choose **Online** or **Local > Apply from List**

Search Online Bibliographic Constant Data
pop-up box appears > **OK**



Constant Data, continued

Online Bibliographic Constant Data List in: “[OCLC Symbol]” opens

Select the name of the constant data you want to apply

Select the **Choose Fields to Apply:**

Fixed

Variable

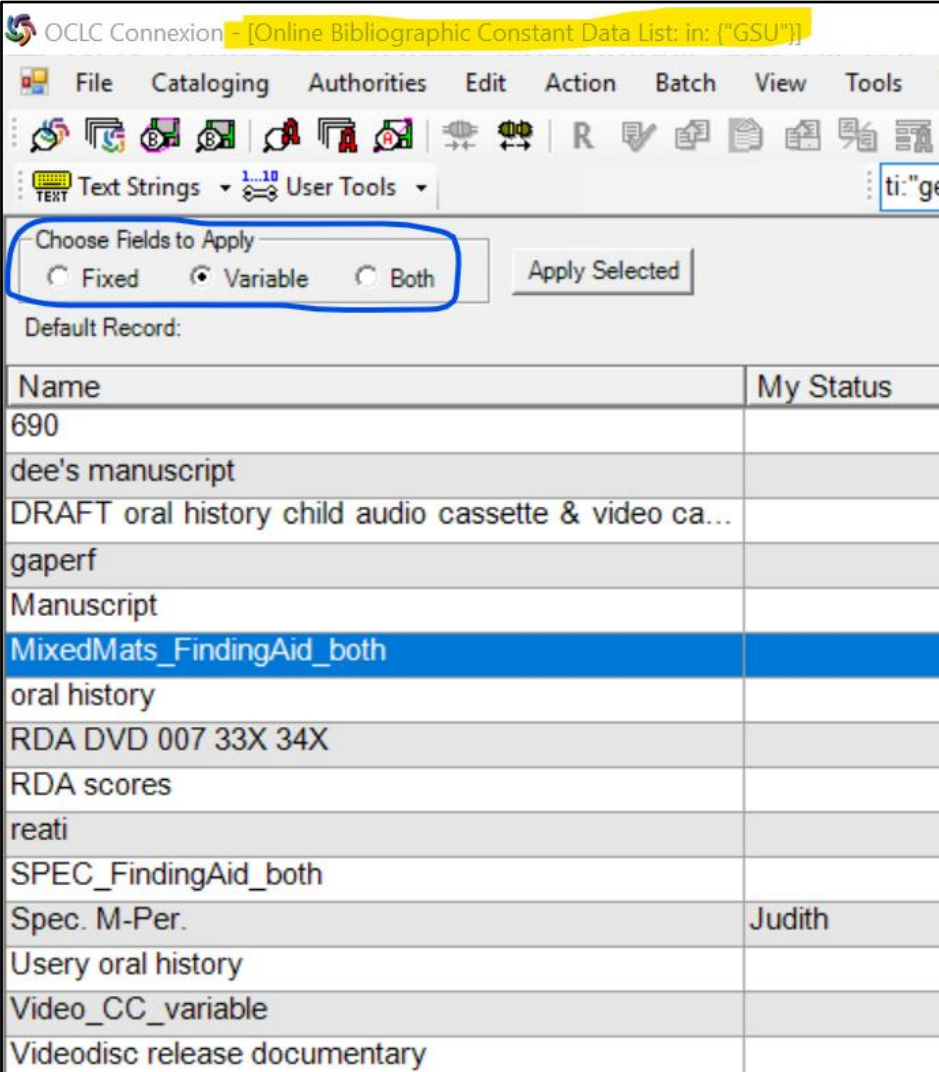
Both

> **Apply Selected**

The changes specified in the Constant Data workform will be made to your bib record

***Note:**

This is the point in the process at which the naming convention becomes important.



OCLC Connexion - [Online Bibliographic Constant Data List: in: ("GSU")]

File Cataloging Authorities Edit Action Batch View Tools

Text Strings 1...10 User Tools ti:"ge

Choose Fields to Apply

☐ Fixed ☒ Variable ☐ Both Apply Selected

Default Record:

Name	My Status
690	
dee's manuscript	
DRAFT oral history child audio cassette & video ca...	
gaperf	
Manuscript	
MixedMats_FindingAid_both	
oral history	
RDA DVD 007 33X 34X	
RDA scores	
reati	
SPEC_FindingAid_both	
Spec. M-Per.	Judith
Usery oral history	
Video_CC_variable	
Videodisc release documentary	

Text Strings

Definition: Strings of text (phrases, fields w/phrases, etc.) you commonly add to a MARC record you are editing/creating.

Examples:

264 _4 \$c ©20xx

504 __ \$a Includes bibliographical references (xx-xx) and index.

Relator terms: , \$e author.

590 __ \$a Labor Collection. (GSU Atlanta Campus)

655 _7 \$a Videorecordings for the hearing impaired. \$2 lcgft

Purpose: Prevent typing errors, ensure consistent phrasing and save time.

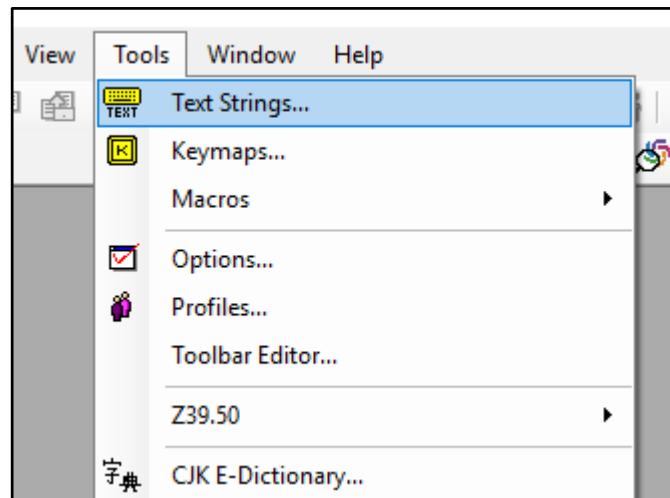
Features: User-created
Stored locally
Shared (ability to import/export)

OCLC Text String Resources:

- [Basics: Set Options and Customize, OCLC Connexion Client Guides](#). (2016), pages 47-52
- [OCLC Connexion Client Cataloging WorldCat Quick Reference](#), page 4
- Tran, M. (2014). Create and use text strings in Connexion client. *Connexion Client Training Videos Series*. Video retrieved from https://www.youtube.com/watch?v=Z6-Tw_G6kic
- [Automation and customization, Connexion client training website](#), Module 5

Text Strings, continued

1



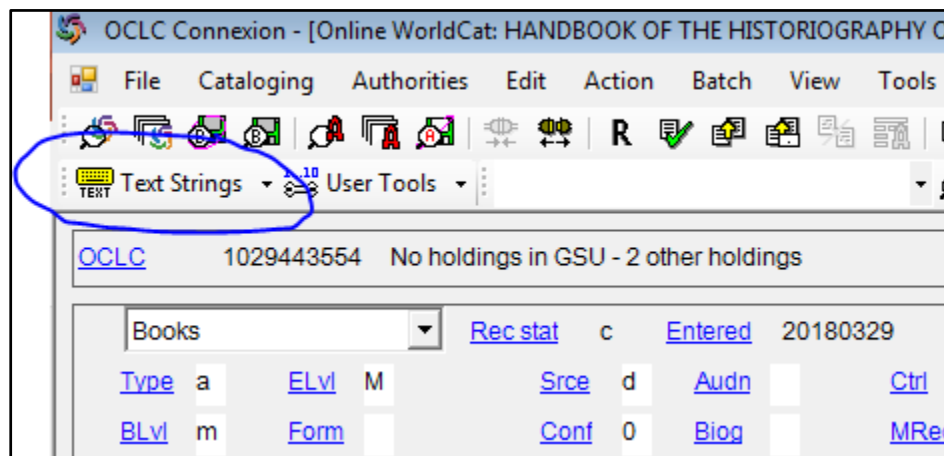
Where:

1 Toolbar tab: **Tools > Text Strings...**

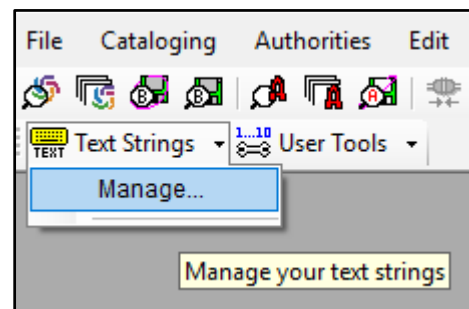
2 **Text Strings Quick Tool** on Toolbar

3 **Text Strings Quick Tool** dropdown arrow > **Manage**

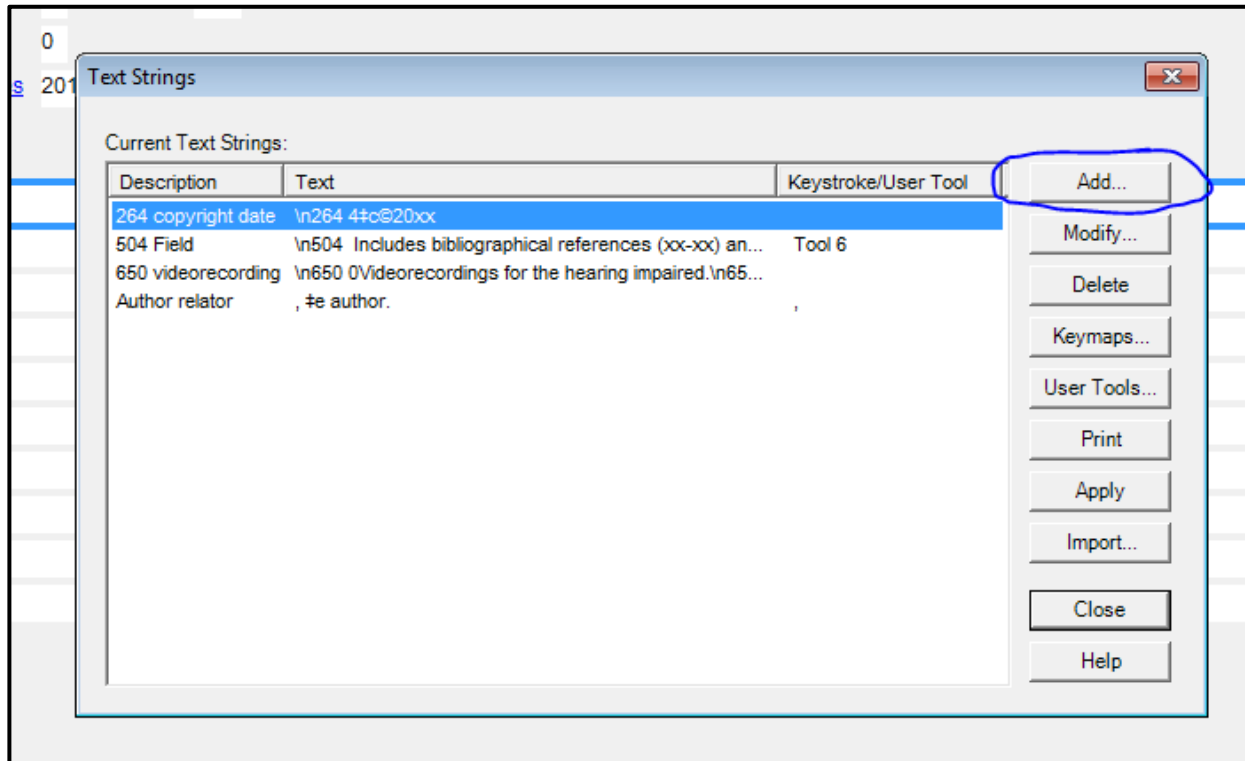
2



3



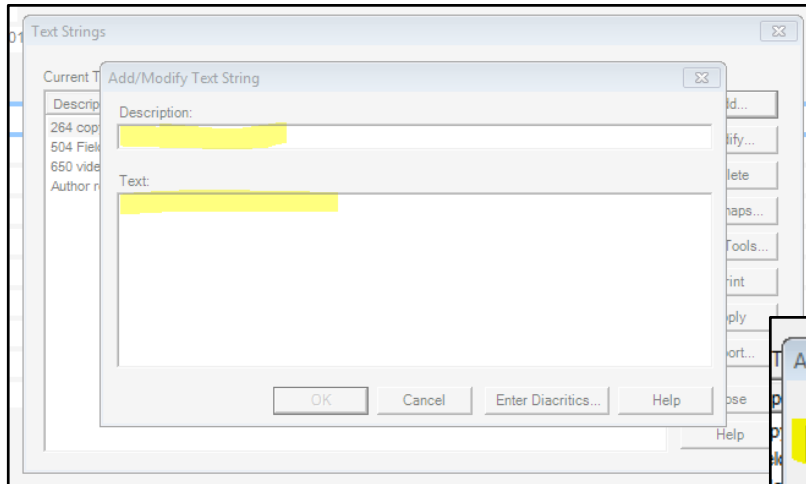
Text Strings, continued



Creating a text string:

- Pop-up box will show all text strings.
- If you've not created any, this box will be empty.
- To create a new one, click Add.

Text Strings, continued



Description Field:

Name it something meaningful that indicates what it will do for you

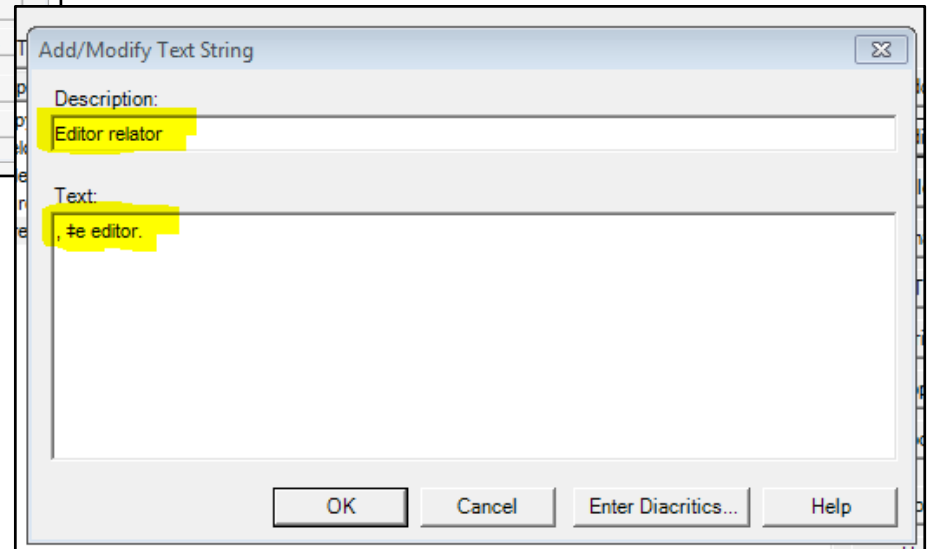
Example: Editor relator

Text:

Enter the text exactly as you want it to appear in a record.

Example:

,[space][ctrl+d]e[space]editor.



***Note:** In this example, don't hit the return or enter key at the end of the text, just press ok. Return or enter is the command for creating a new field, and not an intended action for this text string.

-For this particular text string, once selected, it will be placed where your cursor is. You'll need to be mindful of this and remember to remove any unnecessary punctuation once the text string has been placed.

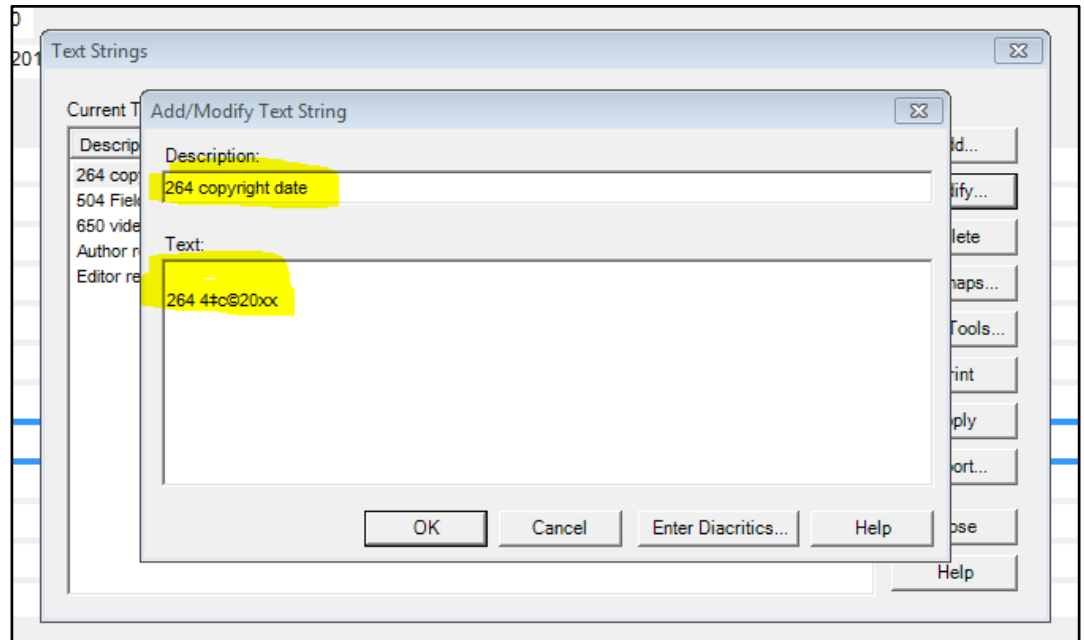
Text Strings, continued

Description Field:

Example: 264 copyright date

Text:

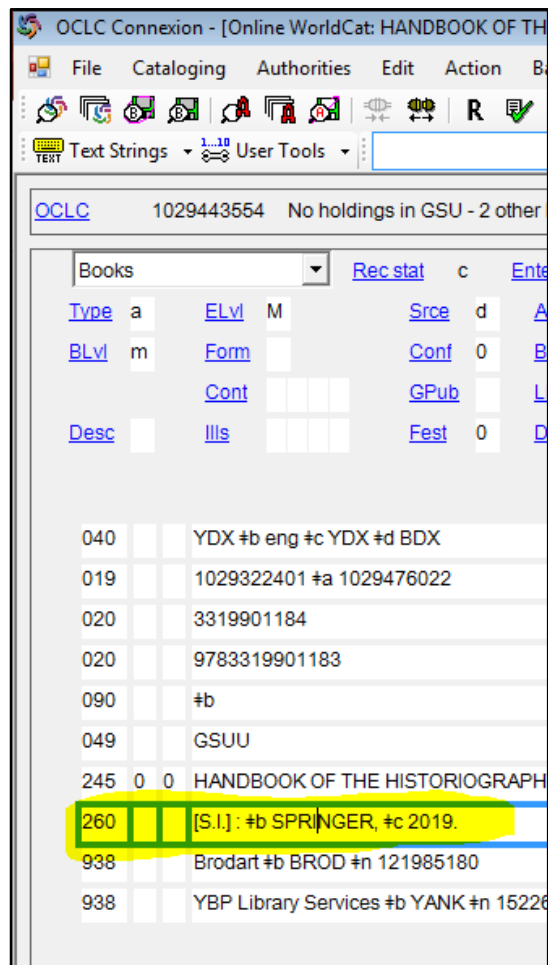
Place your cursor in the text box; hit the enter key on your keyboard to create a new field. type the field number you want to add



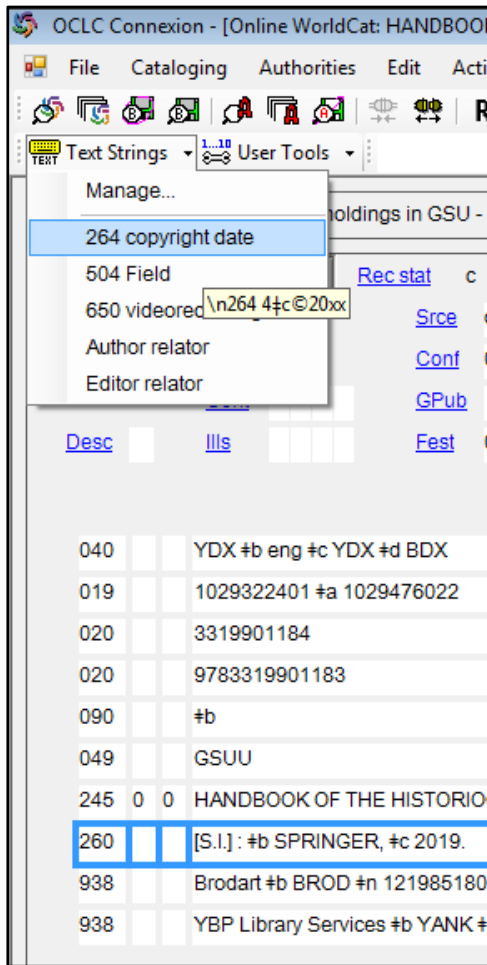
*Example: 264[space]4[ctrl+d]c[click **Enter Diacritics...** and select copyright symbol]20xx*

***Note:** By adding “20xx”, the field will have to be edited once added to the record. Using the xx, creates a visual cue for an edit that you are more likely to see before publishing/updating the record.

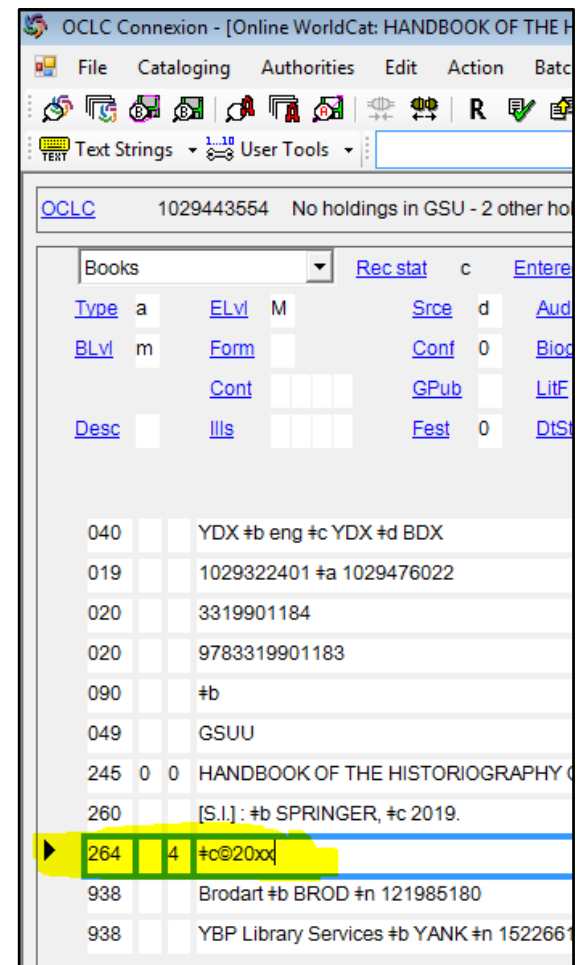
Text Strings, cont'd



1 Place the cursor anywhere within the field above where the new field should be added.



2 Select the text string from the list of options.



3 The new field will be created and the phrasing added.

Text Strings, continued

From the Text Strings editor box:

- Modify/delete existing text strings
- Import a file of text strings
- Re-order/sort your text strings
- Print a list of text strings
- Create shortcuts to your text strings by assigning them to User Tools and Keystroke commands

***Note:**

- Be mindful of your cursor placement within the record before applying a text string
- A text string can be comprised of a limitless number of characters
- Text strings are stored in a single file named TextStrings.xml on your hard drive
X:\Documents and Settings\[user name]\ApplicationData\OCLC\Connex\Profiles\MyProfile,
where X is the letter of your hard drive
- Assigned text strings are retained each time you open or update your program

Macros

Definition: A single instruction that expands automatically into a set of instructions to perform a particular task; short computer programs that automate routine tasks

Examples:

RDA records: add 33x fields

Change the case of your selected text

ALL CAPS to Sentence case or lowercase or Initial Capital Letters

Browse the Authority Index based on a heading in your authority or bib record

Add/Edit an 007 through a prompted menu

Add or remove punctuation based on PCC policy

Update holdings and export bib record

Purpose: Provide efficiency and consistency to more complicated tasks.

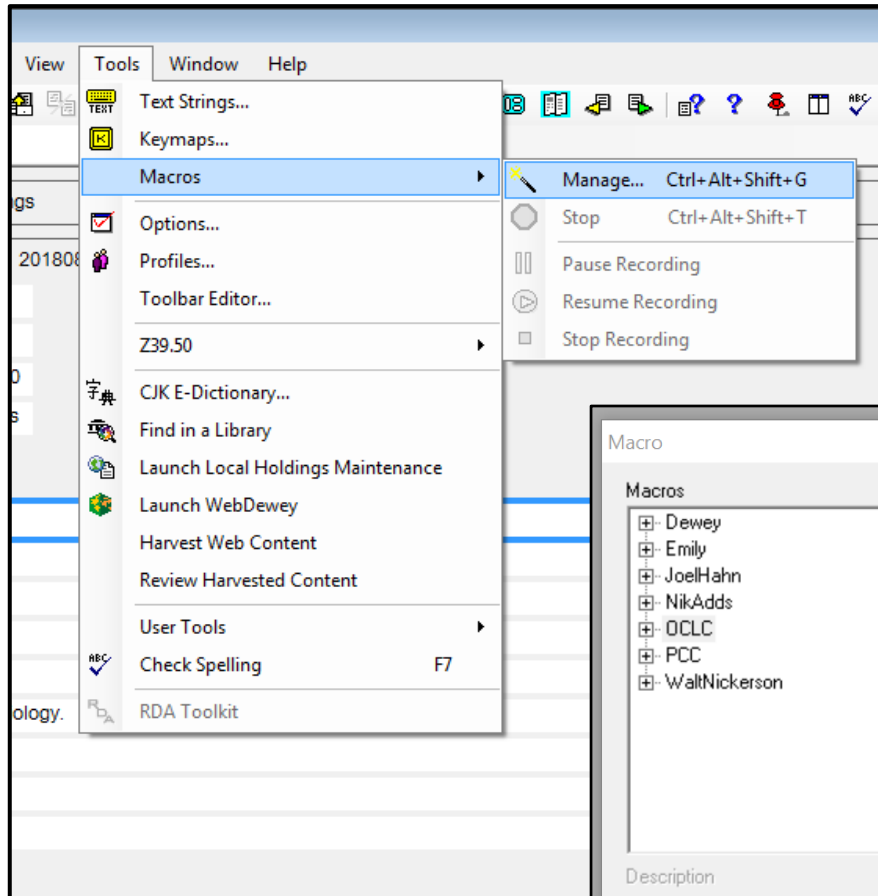
Features: Pre-loaded or User-created

Updated/Shared: X:\Program Files (x86)\OCLC\Connexion\Program\Macros
as OCLC.mbk, Dewey.mbk, etc. (X = drive letter for your computer)

OCLC Macros Resources:

- [Basics: Set Options and Customize, OCLC Connexion Client Guides](#). (2016), pages 19, 54
- [Basics: Use Macros, OCLC Connexion Client Guides](#) (2016)
- [Connexion client macros, OCLC Support](#) (2020)
- [Automation and customization, Connexion client training website](#), Module 5

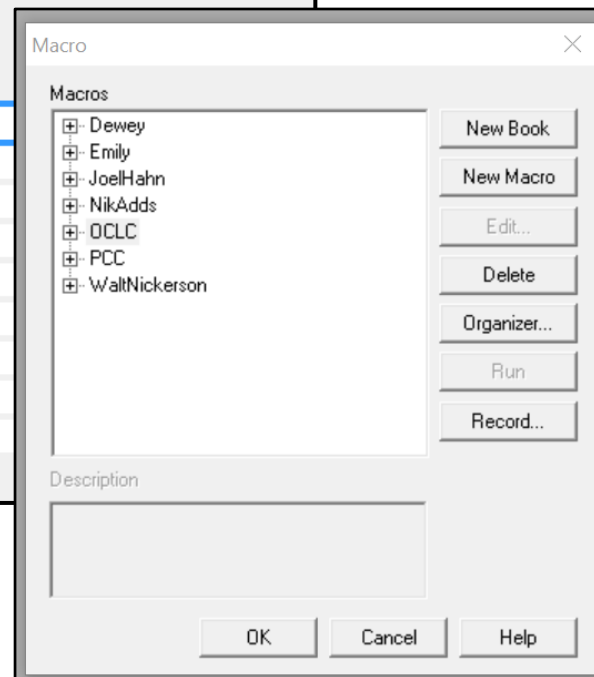
Macros, continued



Where:

Toolbar tab:

Tools > Macros > side menu > Manage...



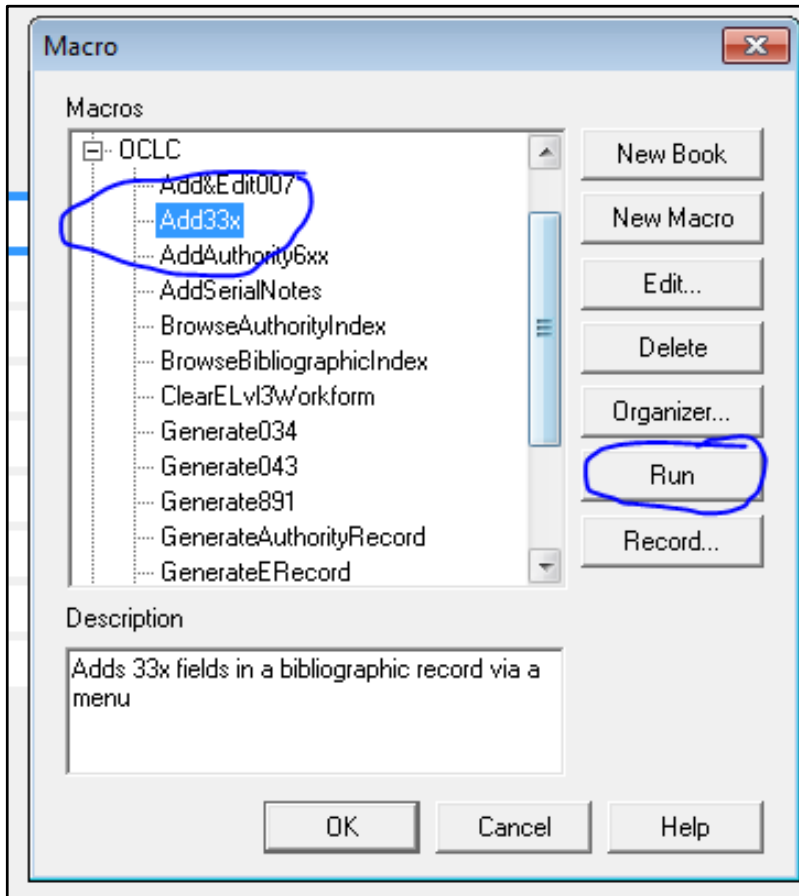
Pop-up box appears

The Macro manager is pre-loaded with books of macros: Dewey and OCLC.

From this box:

- Create new books
- Create new macros
- Edit macros
- Delete macros

Macros, continued



Running or Applying:

Open a record > Toolbar tab: **Tools** >

Macros > side menu > **Manage...** >

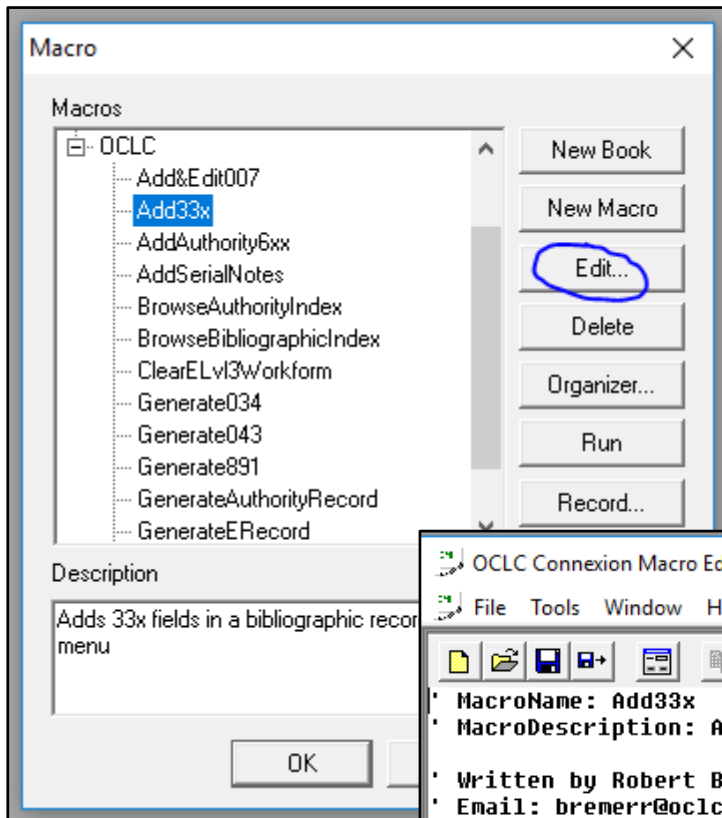
From pop-up, double-click a book name >

Select a macro > **Run**

The changes will be made to your record.

***Note:** This OCLC Add33x macro creates a pop-up box with drop-down menus for you to select the appropriate attributes. Not all macros run this way.

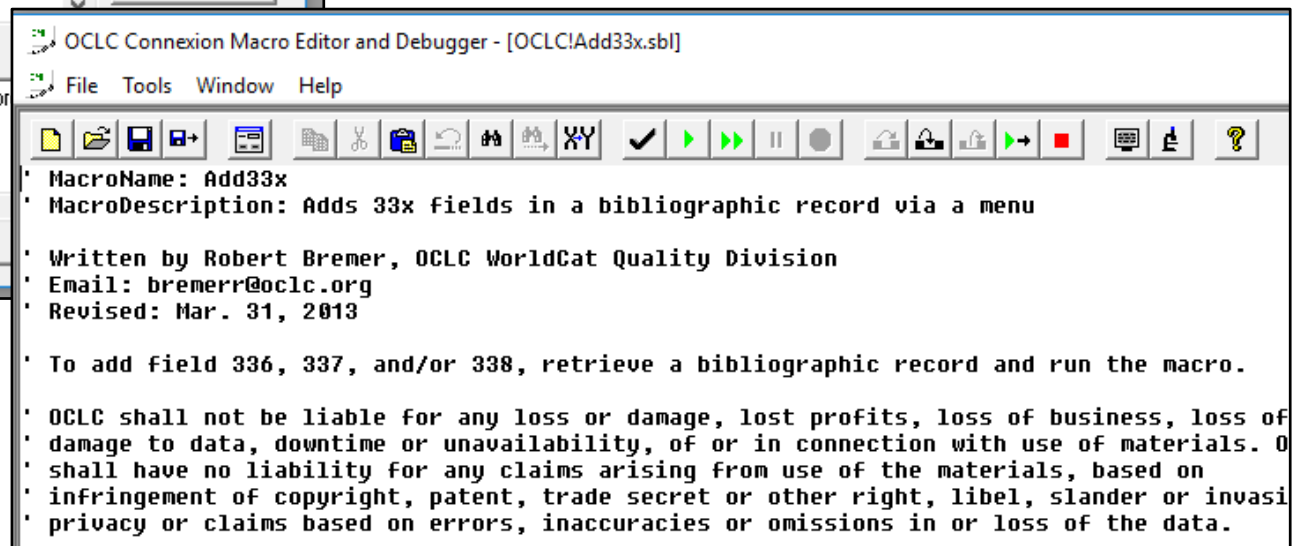
Macros, continued



Editing:

Toolbar tab: **Tools** > **Macros** > side menu > **Manage...** > From pop-up, double-click a book name > Select a macro > **Edit...** >

OCLC Connexion Macro Editor and Debugger box opens, displaying the macro's code



Macros, continued

How to create:

- From scratch within OCLC using a macro editor

Joel Hahn, Niles Public Library District, Illinois, has written how-to guide which includes how to import macros created by your colleagues.

<http://www.hahnlibrary.net/libraries/oml/index.html>

- Using a macro recorder to capture your actions and the client writes it for you
Merry Morris, Free Library of Philadelphia, has written a guide that covers how to use the macro recorder.

<http://computerwhizzard.50megs.com/>

Where to find OCLC macros:

- [Connexion client macros, OCLC Support](#) (2020) provides information about pre-loaded and additional resources including the following:
 - Joel Hahn's website: <http://www.hahnlibrary.net/libraries/oml/index.html>
 - Walt Nickeson's macros: <https://github.com/wnickeson/WaltsMacros>

***Note:**

-Do not create new macros in the OCLC or Dewey macro books. If/when upgraded, locally created macros in this folder/book will be overridden.

User Tools

Definition: Shortcut to a command

Examples:

Enter a diacritic or special character (©, &, etc.)

Run a macro (add 3xx fields)

Issue a menu command (Delete record)

Insert a text string (504 field)

Purpose: Provides a way to group your 10 most frequently used commands into one area.

Features: User-assigned

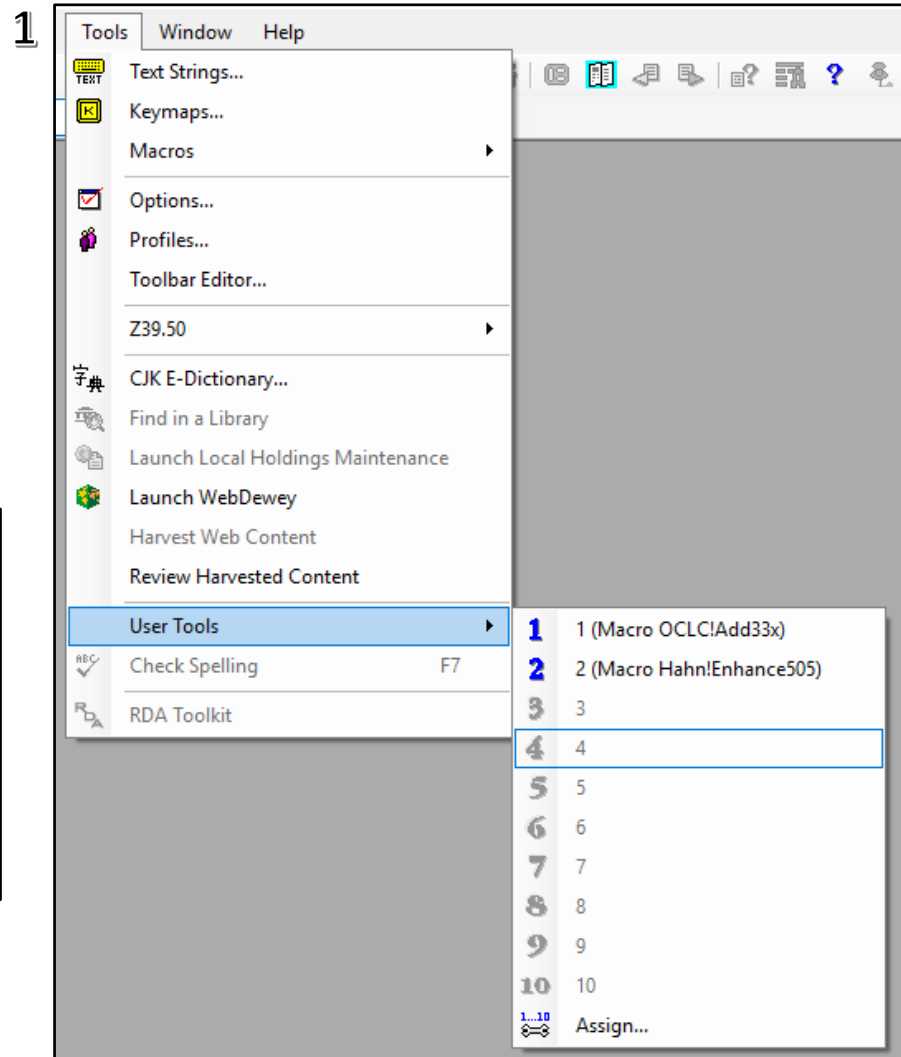
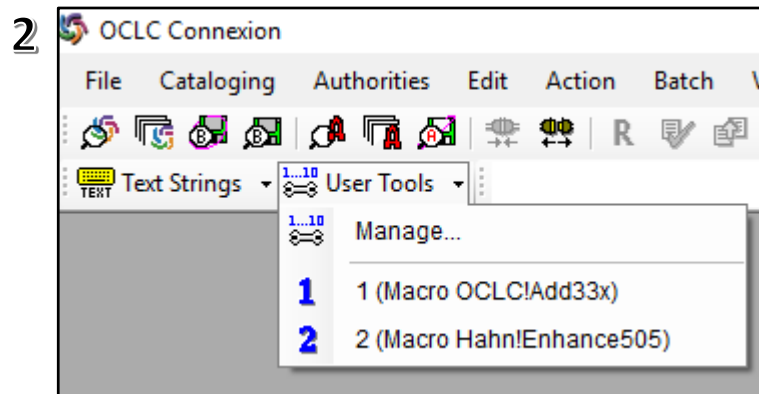
OCLC User Tool Resources:

- [Basics: Set Options and Customize, OCLC Connexion Client Guides](#). (2016), pages 43-46
- [Automation and customization, Connexion client training website](#), Module 5

User Tools, continued

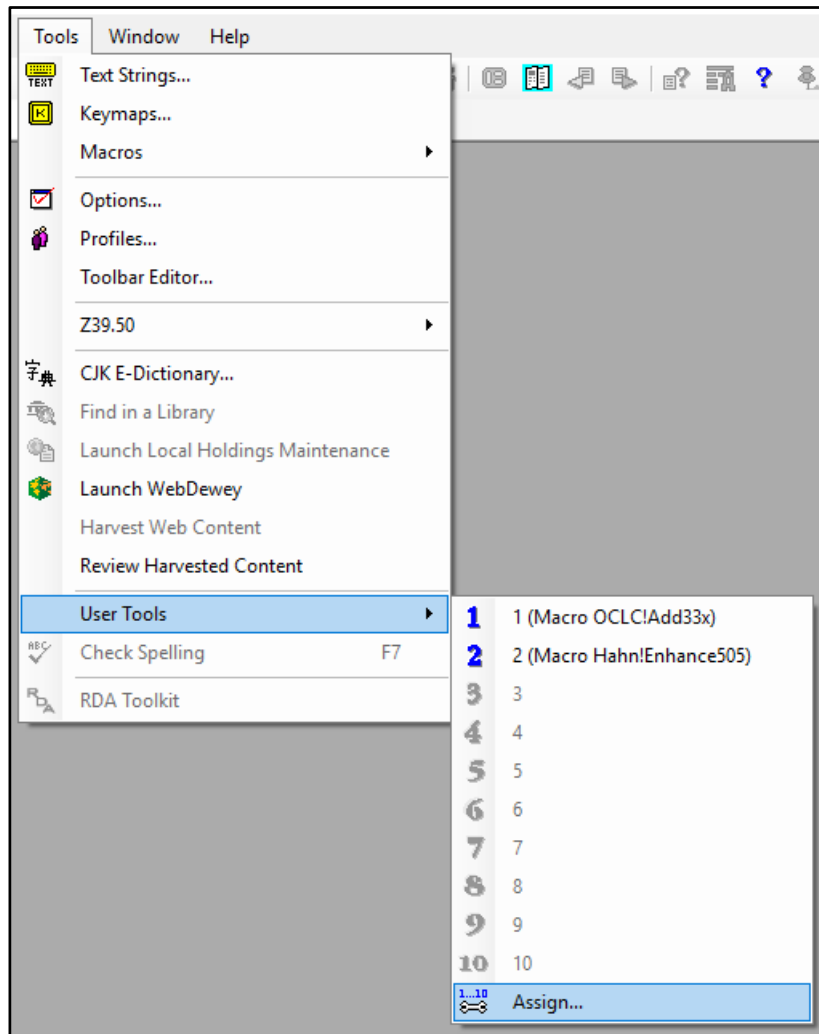
Where:

- 1 Toolbar tab: **Tools > User Tools**
- 2 **User Tools Quick Tool** on Toolbar



User Tools, continued

1

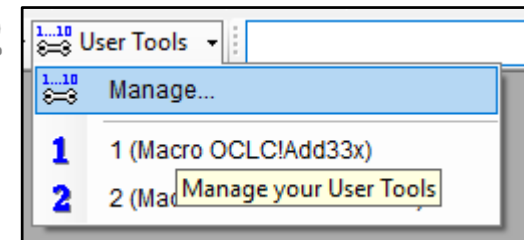


How to Assign:

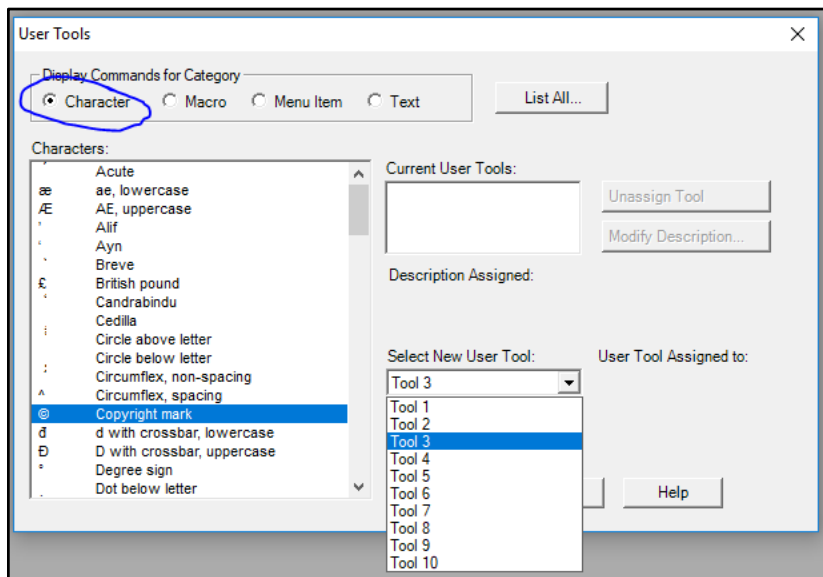
1 Toolbar Tab: **Tools > User Tools > Assign...**

2 User Tools Quick Tool > **Manage...**

2



User Tools, continued



User Tools editor box opens.

Category options: Character, Macro, Menu Item, Text (Text String)

Select a category. *Example: Character*

List of **Characters** displays in window.

Select a frequently used character.

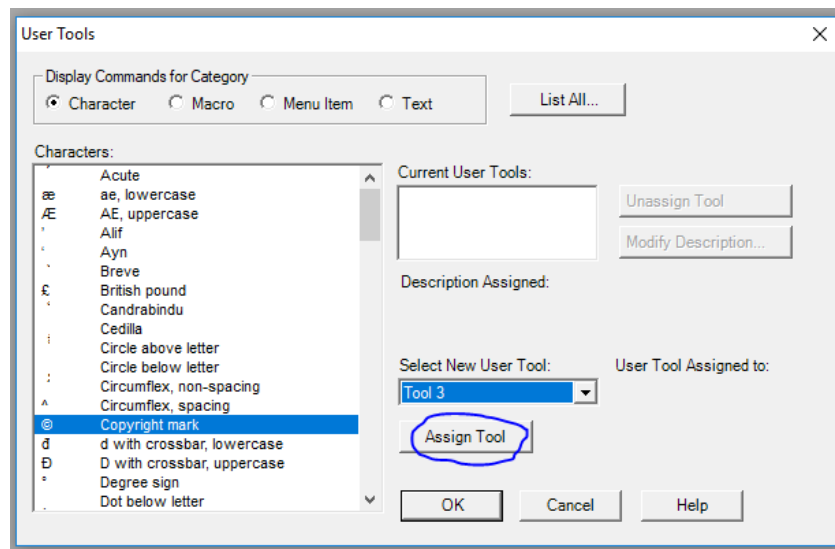
Example: Copyright mark

Select New User Tool: drop down menu

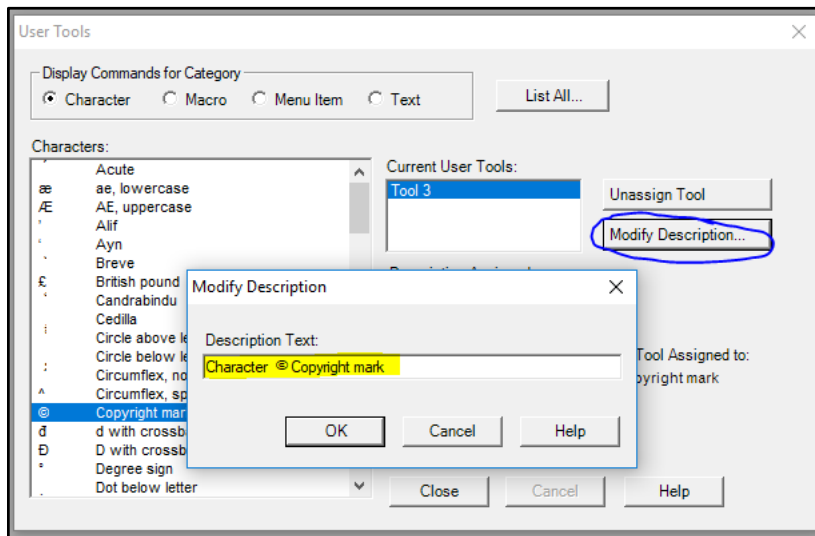
Select the User Tool number for your chosen comand (only 1-10)

Example: Tool 3

Click **Assign Tool**.

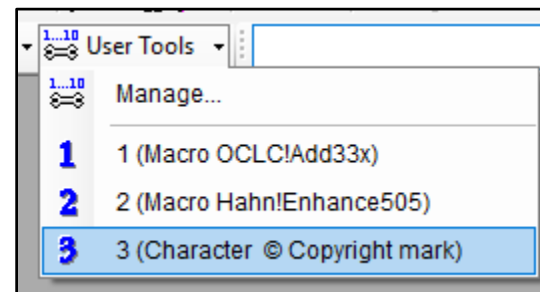
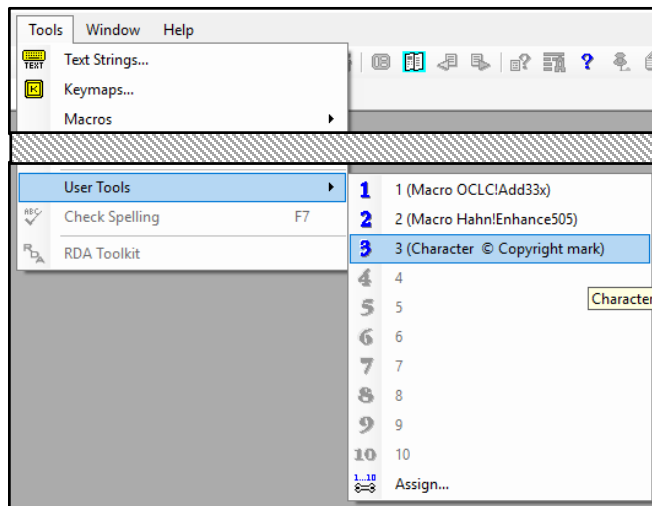


User Tools, continued



Modify the User Tool description to make it more meaningful to you

Modify Description... >
[change Description Text: > OK



This newly assigned User Tool is now available in your list of User Tools.

User Tools, continued

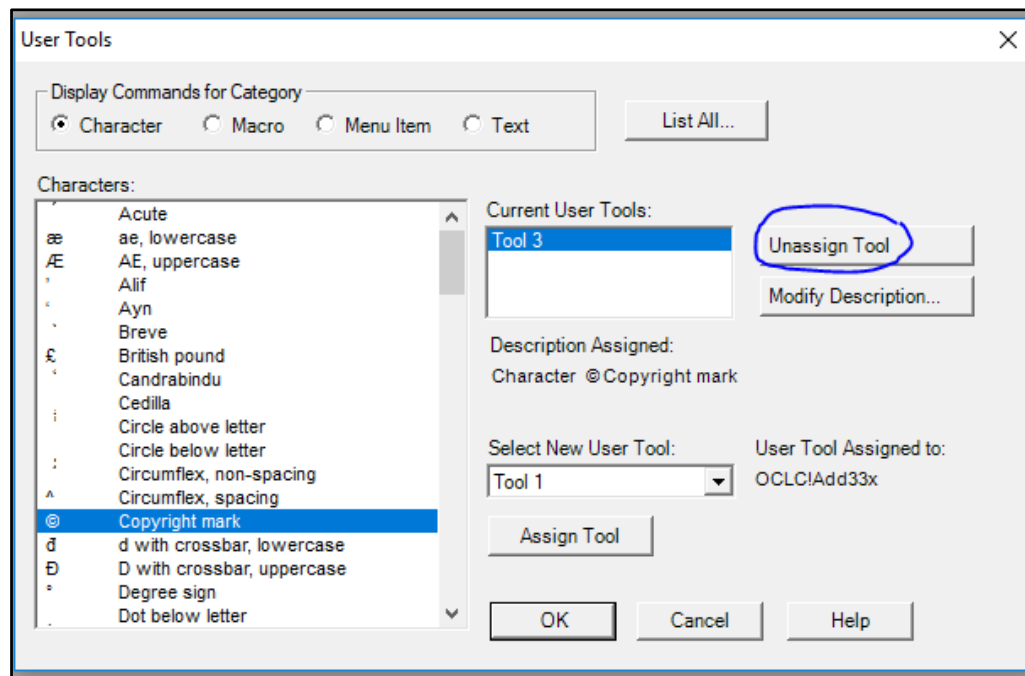
How to Unassign:

Repeat the same steps used when assigning a command.

Once the command is highlighted in the window, the User Tool assignment will be visible in the **Current User Tools:** window.

Select that assignment.

Click **Unassign Tool**



*Note:

- Only 10 slots for assignment available; listed as a number, 1-10, from the User Tool menu
- When assigning User Tools, always click Assign Tool in the pop-out box to apply the changes.
- Careful! More than one command can be assigned to a User Tool. Unassign the existing command before assigning a new command.

Backup Customizations

Customizations are stored in data files which are then stored in folder: **\MyProfile**

File location on computer:

X:\Users\[user name]\AppData\Roaming\OCLC\Connex\Profiles\MyProfile

**X should be replaced with the letter corresponding to your hard drive*

The following table describes settings and customizations files:

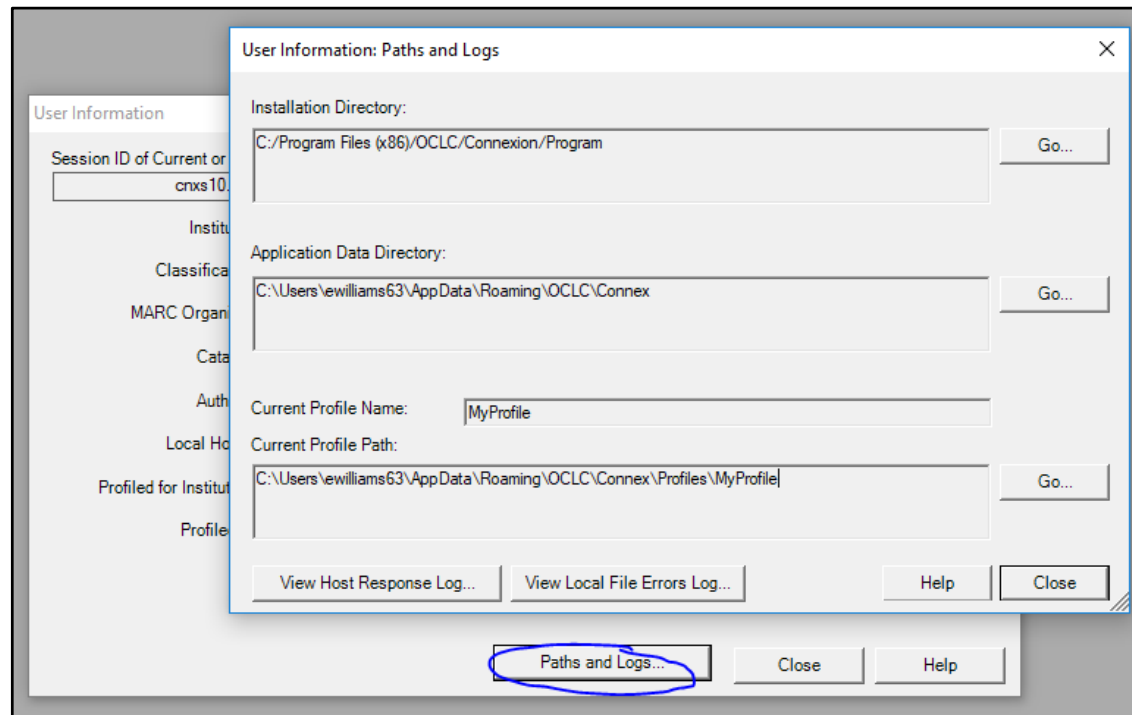
File name (default)	Purpose of file
Custom.Keymap.xml (or other .Keymap.xml files you create)	Stores customized keystrokes that you assign in Tools > Keymaps . When you use a keystroke shortcut, the client carries out any action you assigned to the shortcut. If you did not assign an action, the client carries out the preassigned action.
AppExclusions.Keymap.xml	Stores individual default keystroke shortcuts that you unassign. The client uses the file to restore a single default keystroke when you reassign it.
Options.xml	Contains most of your option settings and customizations; for example, those from Tools > Options tab pages, local file settings, customized toolbar, stored previous searches for all search dialogs, and other information unique to the way you use the client.
TextStrings.xml	Stores text strings you create to enter data that is often repeated in records (Tools > Text Strings).
user.dic	User dictionary for the spell checker. To customize the dictionary, go to Tools > Options > Spelling and click Edit User Dictionary .
UserLagonInfo.xml	Stores your user logon information from the current or most recent online session (in the client, opens via View > User Information or <Ctrl><Alt><U>)
WebLinks.xml	Contains automatic updates to the client that do not require a complete application upgrade.

Table from *Getting Started with OCLC Connexion Client, OCLC Connexion Client Guides* (2019) Page 33

OCLC User Tool Resources:

- [Getting Started with OCLC Connexion Client, OCLC Connexion Client Guides](#) (2019) pages 33-37
- [How do I copy Connexion client files from one PC to another? OCLC Connexion Troubleshooting](#) (2019)

Backup Customizations, continued



Quick access to Connexion Client Files:

Toolbar Tab: **View > User Information > Paths and Logs...** > pop-up box appears with your **Current Profile Path**:

Backup Customizations, continued

***Note:**

- Backing up your profile will be helpful:
 - Setting up new authorization profiles for new cataloging staff
 - If obtain new computer and Connexion Client is newly installed
 - There's a global pandemic, and you need to install Connexion Client on a home computer or laptop
- If you don't have Administrative rights to your computer, you'll need to work with the person who does.
- The address is likely to be different for each computer and user, so use caution as it's not as easy as replacing one folder with another.
- Read the documentation! Ask for help!
- Don't attempt unless you're really confident you can fix anything you've broken!

Thank you!

Emily: ewilliams63@gsu.edu

Nothing will work unless you do.
-Maya Angelou