

OCLC Connexion Client

April 2005

Class outline

(rev. 3-15-2005)

Handouts

- ❖ Class outline
- ❖ “Cataloging transition workshop: OCLC Connexion Client”
- ❖ Screen print: “Connexion client documentation”
- ❖ “Passport, CatME, Connexion comparison”
- ❖ “Function key template for OCLC Connexion Client”
- ❖ “Keyboard shortcut commands in OCLC Connexion”
- ❖ Class evaluation form

Web sites

- ❖ Connexion Client documentation

<http://www.oclc.org/support/documentation/connexion/client/default.htm>

PART I: Display and Searching

1. Display/customization

- ❖ NOTE: Context-sensitive Help available
- ❖ Menus relevant to searching:
 - Cataloging: Search: Choose type of search
 - Authorities: Search: Choose type of search
- ❖ Toolbars relevant to searching:
 - Cataloging Search WorldCat
 - Cataloging Browse WorldCat
 - Cataloging Search Online Save File
 - Authorities Search Authority File
 - Authorities Browse Authority File

❖ Customization

Tools

- Example (setting fonts): Tools: Options: Fonts
- Example (customizing toolbars): Tools: Toolbar Editor: [drag and drop]
- Example (setting timeout): Tools: Options: General: Session timer options
- Example (adding authorizations): Tools: Options: Authorizations

File Manager

- File: Local File Manager
- Choose File Type (Bibliographic, Bibliographic Constant Data, etc.)
- Create File; Set as default; etc.

2. Searching bibliographic records

❖ Cataloging Search WorldCat

- Expand/Collapse
- Retain search/Clear search
- **Command line search**
- Keyword search
- Numeric search
- Derived search

❖ Cataloging Browse WorldCat

- Don't need to add "sca ti"

3. Searching authority records

❖ Authorities Search Authority File

- **Command line search**
- Keyword/Numeric search

❖ Authorities Browse Authority File

- Can include expanded term

[Exercises]

4. What about the Export function?

- ❖ Minor editing
 - Deleting a field ([alt] + [del])
 - Adding a 910
- ❖ (Setting up files): Tools: Options: Export
- ❖ (Exporting a record): Action: Export

[Break]

PART 2: Cataloging

5. Cataloging general notes

- ❖ Right-click for MARC Field Help (bibliographic and authority records)
- ❖ **NOTE: CatME, Passport save files don't transfer to Connexion. Need to clear these out before migration**

6. Macros

- ❖ Claudia Horning, Raphael Villena (UCLA Library Cataloging Center)
- ❖ NACO macro
- ❖ UCLA-specific macros (049/910, etc.)
- ❖ Tools: Macros: Manage
- ❖ Tools: Keymaps
- ❖ View: Assigned keys
- ❖ **MACRO Express:** Consult the Macro Express document for shortcut keys which can be applied in the Connexion Client (go to: M:\MECat and click on: Macro List.xls)

7. Copy cataloging

- ❖ Editing (modifying existing information)
 - Adding new fields
 - Moving fields ([alt] + [up arrow]; [alt] + [down arrow])
- ❖ Diacritics: **Diacritic follows the letter it modifies**
- ❖ Action: Save record to online file

- ❖ Action: Save record to local file
- ❖ Action: Delete record from local file
- ❖ Action: Update
- ❖ Edit: Undo
- ❖ Edit: Cancel Changes

8. Original cataloging

- ❖ Lock/replace
 - Action: Lock Master Record [etc.]
- ❖ Creating original bibliographic records
 - [From workform]: Cataloging: Create: Single Record
 - [From existing record]: Edit: Derive: New record
 - [To customize derived fields]: Tools: Options: Derive record

[Exercises]

9. Controlling headings

- ❖ Links headings in bibliographic records to authority records
- ❖ Need to use Enhance/National Enhance
- ❖ [All]: Edit: Control headings: All
- ❖ [Individual]: Choose heading, left click after it: Right click: Control single heading: [sometimes] Modify heading OR Insert heading

10. Using Constant Datas

❖ Constant Data files

- File: Local File Manager: Bibliographic Constant Data
- Example:

Choose File Type: Bibliographic Constant Data:

I:\YRL-Mono Connexion\disconstantdata

NOTE: these are Constant Datas which have been created for the UCLA Library Cataloging Center

NOTE: Please consult with supervisor before adding Constant Datas to this file

(Setting up the I: drive): File: Local File Manager: Bibliographic Constant Data: Configure Paths: [I:\YRL-Mono Connexion\disconstantdata]: [OK]

- (Set as default)

[NOTE: Setting default changes default for everyone using the same file]

- (Creating a file for Constant Data storage): File: Local File Manager: Bibliographic Constant Data: Create File

❖ **Creating Constant Datas**

- [From workform]: Cataloging: Create: Constant data
- [From existing Constant Data]: Cataloging: Search: Local Constant Data: OK: [double-click appropriate Constant Data]: Edit: Derive: New Constant Data

❖ **Applying Constant Datas**

- Cataloging: Create: Single record: [Books, or other format]
- Edit: Constant data: Local: Apply from list: [OK]: [Highlight appropriate Constant Data]: [choose Fixed, Variable, Both]: Apply selected **OR**
- Edit: Constant Data: Local: Apply default

❖ **Deleting Constant Datas**

- Cataloging: Search: Local Constant Data: OK: [highlight appropriate Constant Data]
- Action: Delete Record

Questions? Comments?