

OCLC Connexion Client Procedures

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Before starting, I would recommend getting the following documents:

1. Getting Started with OCLC Connexion Client
<http://www.odc.org/support/documentation/connexion/client/gettingstarted/gettingstarted/gettingstarted.pdf>
Go to page 40 (chapter 8) called Customize Connexion Client PRINT PAGES 40-48
2. OCLC Connexion Client Quick Reference
<http://www.odc.org/support/documentation/connexion/client/cataloging/catquickref/connexionclientquickref.pdf> 12 pages
3. Setup sheet for OCLC Client Connexion
<http://www.odc.org/support/documentation/connexion/client/gettingstarted/setup.pdf> 4 pages

Also, if you don't already have [Load Bibliographic Report Directions for Symphony 10-08.doc](#) from RSA's Cheat Sheets page, I would recommend it.

If you have not installed Connexion Client, it requires a software download and setup. The software is free, but requires an OCLC cataloging account to access. If you have never installed the software, you can go to: <http://psw.oclc.org/software.htm>

Type in the authorization #: (your cataloging OCLC #)

Type in the password: ALSOCLC

Click on Connexion Client 2.10 Complete Software (44.1M)

(includes Microsoft .NET Framework 2.0 and MDAC, required to install and run client 2.10)

Follow the download instructions.

After downloading, set your settings by following the **Setup Sheet for OCLC Connexion Client**

Searching for Records and Saving to a Local File

Open OCLC Client

Click on BATCH

Click on ENTER BIBLIOGRAPHIC SEARCH KEYS

In the USE DEFAULT INDEX box, click on the arrow

If searching by ISBN #s, choose ISBN (bn:)

Click in the QUERRY box and start wandring in #s. (Other searches can be done by indicating the search type (see Quick Reference))

When all searches are entered, click SAVE at the bottom of page.

Close Search box

Click on BATCH

Click on PROCESS BATCH

Choose your local file by clicking on the box

Choose ONLINE SEARCHES in the process box
Click on OK

To Display the items in the Local Save File

Click on CATALOGING
Click on SEARCH and then LOCAL SAVE FILE
Click on OK
Items will be listed.

Local Constant Data

To make a constant data file with the 949 information, click on Cataloging
Create
Constant Data

Type in what you want in the 949 field (I have been copying the delimiters ≠ from records)
R to reformat
X will ask you if you want to save; say YES
Name your file and indicate if you want it to be the default CD record

To edit records

Follow instructions to display the items in the local save file
Double click record to look at it
Click the forward & back buttons to move through records
Delete any records you don't want (garbage can icon)
Click the record X to close the record and return to list
Review record and make any changes. [alt][delete] will delete whole fields
Add Constant Data by clicking
 Edit
 Constant Data
 Local
 Default or from list
 Apply to record
Check spelling (Click TOOLS | Check Spelling)
Validate (icon)
Mark for update (icon)

When all records are updated, batch updates by clicking on

 Batch
 Process Batch
 Box for local save file
 Online record actions in process box
 OK

Redisplay local save file and all records should say HELD

Export each record

Open local save file

Double click the first record you wish to export—first record will ask you to save to what file. I save as OCLC EXPORTS | CLIENT | date (i.e. 2008Jun27)

Each record will each be added to file.

Follow RSA procedures to export to Workflows utilities and run report.

NOTES:

- Using the [alt] [del] keys in tandem, allows you to delete a field. Click on the field you would like to delete then press [alt] [del] keys together.
- When done with records in local save file, I delete them before starting a new batch. To delete all records, go to the list and click the first record. Then hold down the [shift] [end] to highlight all the records. Click the trash button.
- If you are doing more than one export batch a day, be sure to logout of Client and log back in before exporting or will continue to add records to one file.