Basics: Use Client Interface

Last updated: May 2021

Revision History

Date	Section title	Description of changes
January 2008	2 Menus (commands, keystrokes, and toolbar buttons)	• Added a note about optional display of new Hand Press Book menu (option in Tools > Options > Hand Press Book), which can be used by authorized Consortium of European Research Libraries (CERL) members only • Added two new commands to the Tools menu, Harvest Web Content and Review Harvested Content, for when this functionality becomes available (to be announced sometime after the release of client version 2.10)
	8 Record lists	Clarified the description what the LC Authority File Root Browse List displays and how to use it
April 2011	2 Menus (commands, keystrokes, and toolbar buttons)	• Added RDA Toolkit command to Tools menu (you must be an RDA Toolkit subscriber and enable the links to RDA Toolkit field descriptions in Tools > Options > RDA Toolkit) • Added RDA Toolkit command to right-click menu • Removed Useful Web Links > Connexion Tips from the Help menu
	7 Records	MARC Field Help for authorities records opens field descriptions in *OCLC Authorities: Formats and Indexes*
	8 Record lists	WorldCat truncated lists now show the language of cataloging column (**CatL**) by default
March 2012	2 Menus (commands, keystrokes, and toolbar buttons)	• Added new menu commands: — Cataloging > Show > All GLIMIR Cluster Records — Edit > Classify — Help > Useful Web Links > OCLC Classify Web Service • Edit > Insert from Cited Record now works for 800, 810, 811, and 830 fields as well as 760-787 • Update to instructions for using access keys for menu commands for Windows Vista and Windows 7
	7 Records	Added a description of GLIMIR information shown in records
	8 Record lists	Added a description of the types of GLIMIR lists
September 2012	All	Removed references to pathfinders
May 2014	7 Records	Removed information on expiration of saved records
June 2016	2 Menus (commands, keystroke shortcuts, and toolbar buttons 7 Records 8 Record lists	Removed references to institution records
May 2021	1 Main window	Added note pointing to Connexion client version 3.0 documentation.

Contents

1. Main window

Note: If you are using Connexion client version 3.0 or newer, see **Connexion client** for applicable documentation.

About the Connexion client main window

The main window is what you see when you open the client interface to OCLC Connexion. By default, it displays:

- A title bar with standard buttons to minimize, maximize, restore, or close the window.

- Menus containing the commands you use to make selections or open windows (also called "dialogs") for performing cataloging activities.

- Toolbars - a main client toolbar containing a selection of toolbar buttons corresponding to often-used menu commands, a Search WorldCat command line text box, and two quick tool dropdown lists, one for text strings and one for user tools.

- Work area (a blank gray space) where client windows and record and list windows open.

- Status bar, which displays information about the current online session and/or about the displayed record to help you keep track of your work.

Use menus, toolbar buttons, or keystroke shortcuts

You can do most actions in the client in three ways:

- Click a **command on a menu**.

- Click a **toolbar button** that corresponds to a menu command.

- Press the **keystroke** equivalent to a menu command (whether a default keystroke or one you assign).
  Example:
  To export records:
  Click **Action > Export**.
  Or
  Click
  Or
  Press <F5>.

The toolbar also contains quick tools to complete several tasks directly from the toolbar instead of using a menu command:

- **WorldCat Quick Search tool:** Use the following text box on the toolbar to enter a full syntax command line WorldCat search without having to open the Search WorldCat window. and click the adjacent Search WorldCat icon to send the search:

Enter the full syntax search in the text box and click the adjacent Search WorldCat icon to send the search.

- Quick **tools for text strings and user tools:** Apply and manage text strings and user tools directly from the appropriate quick tool on the toolbar:

Click an arrow to open a list and select/apply a text string or user tool, or click **Manage** on the list to open the Text Strings or User Tools windows to create, change, or delete text strings or user tools.

- By default, the WorldCat search box and quick tools for text strings and user tools display on the toolbar. Go to **View > Toolbars** to hide or re-display them (or to hide or re-display the client toolbar.

Menus

See Menus (commands, keystroke shortcuts, and toolbar buttons) for a description of commands on a menu and the equivalent toolbar buttons and keystroke shortcuts for the following:

- File
- Cataloging
- Authorities
- Edit
- Action
- Batch
- View
- Tools
- Window
- Help

Toolbar buttons

The Connexion client ships the default toolbars (see "Toolbars"). The main client toolbar contains a default selection of most often used buttons. However, you can:

- Add buttons for any menu command and delete buttons to customize the toolbar by dragging and dropping buttons from and to the Toolbar Editor (Tools menu).
- Show or hide toolbars (**View > Toolbars**).
- Show the toolbar on one line or two using a setting on the drop-down list at the end of the toolbar.
- Re-position toolbar buttons on the toolbar by holding down <Alt> while dragging and dropping a button to a new location.

Keystroke shortcuts

The client ships with default keystroke shortcuts, which you can view or print after installing (**View > Assigned Keys**), or customize keystroke shortcuts (**Tools > Keymaps**).

Show or hide the status bar

To toggle between showing or hiding the status bar:

Action
Click **View > Status Bar**.   A check mark next to **Status Bar** indicates that that status bar displays.   **Default:** Status bar displays.

Show or hide toolbars

To toggle between showing or hiding toolbars:

Action
Click **View > Toolbars**, and then click **Client**, or click **WorldCat Quick Search**, or click **Quick Tools** (for text strings and user tools).   Check marks next to the menu item indicate which toolbar(s) display.   **Default:** All toolbars display.   **Note:** For purposes of showing and hiding, the two quick tools for text strings and user tools are a single unit.

Stored settings for the main window

The client stores your customizations of the main window. Your settings are retained each time you open or update the program.

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2. Menus (commands, keystroke shortcuts, and toolbar buttons)

About using menu commands and equivalent keystrokes or toolbar buttons

- Catalog in Connexion client by clicking commands on a menu, pressing an equivalent keystroke combination, clicking an equivalent toolbar button, or using a quick tool to interact with the client and the OCLC system.

- Besides the command name, client menus display:

  — To the right of the command, the equivalent keystroke shortcut, if provided or assigned.
  Note: If you assign new key shortcuts, the client menus display the new keystrokes next to the equivalent commands.

  — To the left of the command, the icon for the equivalent toolbar button, if the command has a button.

  — Underlined letters in menu and command names indicating hot keys. See more below about displaying these hot key indicators.

- If menu items are not allowed, both the command and the equivalent button, if on the toolbar, are grayed out.

  Note: For commands that display associated toolbar buttons and that toggle a feature on or off, the current selection is indicated by the highlighted icon while the other possible selections are grayed out.

  Example: For **View > OCLC Fixed Field**, if **Top** is selected, the icon for **Top** is highlighted, while the icons for **Bottom** and **Display as Variable Field** are grayed out.

- If you attempt to use the keystroke shortcut for the command, you cannot tell that the item is available unless your workstation has a sound card and speakers or headphones. If you have these, the client beeps if you attempt a keystroke that is unavailable.

  Example: If the cursor is in field 245, **Control Headings > Single** on the Edit menu is grayed out, as is the equivalent toolbar butt, since controlling a heading is not available for a 245 tag. If you press the keystroke shortcut <F11> for **Control Headings > Single**, the client beeps, but only if the workstation has a sound card and you are using speakers or headphones.

- If you download, install, and use RLIN21 Arabic, Cyrillic, Hebrew, and/or Latin keyboards, see Cataloging, International, "Install RLIN21 Arabic, Cyrillic, Hebrew, or Latin keyboard" for information about conflicts between default keystrokes in the client that include **<Alt>**, **<Ctrl><Alt>**, and **<Ctrl><Alt><Shift>** and keystroke shortcuts for the RLIN21 keyboards.

The following tables list each command for each menu in order as they appear in the client, along with:

- Equivalent toolbar buttons

- Default keystroke shortcuts and access keys (hot keys) for each command

- Brief descriptions of the functions of a command

- Equivalent quick tool, if provided

Notation in the table: **An asterisk (*)** next to a toolbar button indicates that the button appears on the **default** client toolbar. A **double asterisk (**)** indicates that a quick tool equivalent to the corresponding menu command displays on the toolbar by default.

File menu

File menu item	Toolbar button	Default keystrokes and access keys	Use to...
Log On	*	\<Ctrl>\<F1> Or \<Alt>\<F>\<L>	Connect to OCLC Connexion
Log Off	*	\<Alt>\<F1> Or \<Alt>\<F>\<G>	Disconnect from Connexion
Print	*	\<Ctrl>\<P> Or \<F12> Or \<Ctrl>\<F8> Or \<Alt>\<F>\<P>	Print a displayed record
Print List	*	\<Shift>\<F12> Or \<Alt>\<F>\<N>	Print a displayed list or selected entries in a list
Print Label(s)		\<Shift>\<F10> Or \<Alt>\<F>\<N>	Print a label for a record or for multiple records selected in a list without first displaying the label (if offline, print labels immediately or print in batch mode)
Print Accessions List		\<Alt>\<F>A>	Print local accessions lists for displayed local bibliographic records or workforms or for selected records in a local bibliographic save file list
Local File Manager		\<Alt>\<F>\<F>	Open the local file manager to create local files for offline cataloging. The client automatically creates default local files for all available types: • Local bibliographic save file • Local bibliographic constant data file • Local authority save file • Local authority constant data file
Button is included on the default client toolbar.			

File menu item	Toolbar button	Default keystrokes and access keys	Use to...
Import Records		<Alt><F><I>	Import bibliographic and authority records from your local system or from offline services into Connexion. Select options for imported records: • MARC-8 (default) or UTF-8 Unicode data format • Apply default constant data • Assign My Status (bibliographic records only)
Exit	Or in the upper right corner of main window	<Alt><F4> Or <Alt><F><X>	Close Connexion client

Cataloging menu

Cataloging menu item	Toolbar button	Default keystrokes and access keys	Use to...
Search > WorldCat	*	<F2> Or <Alt><C><S><W>	Search for bibliographic records using command line (full search syntax) or guided searching using the following types of searches: • Keyword • Numeric • Derived • Browse (index scan)
WorldCat Quick Search tool	**Quick tool alternative to using the Search WorldCat command. Type a command line search or browse, and click the icon.		
Search > Online Save File	*	<Ctrl><F3> Or <Alt><C><S><S>	Search for bibliographic records in the online save file
Search > Online Constant Data		<Ctrl><N> or <Alt><C><S><D>	Search for bibliographic constant data records online
*Button is included on the default client toolbar. **Quick tool appears on the toolbar by default.			

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Cataloging menu item	Toolbar button	Default keystrokes and access keys	Use to...
Search > Local Save File		<F3> Or <Alt><C><S><L>	Search a specified local save file for bibliographic records
Search > Local Constant Data		<Ctrl><L> or <Alt><C><S><C>	Search a specified local constant data file for bibliographic constant data
Browse > WorldCat	*	<Ctrl><F2> Or <Alt><C><B><W>	Browse an index
Create > Single Record > Books		<Ctrl><Shift><B> Or <Alt><C><C><S><B>	Display a Books workform
Create > Single Record > Computer Files		<Ctrl><Shift><P> Or <Alt><C><C><S><P>	Display a Computer Files workform
Create > Single Record > Continuing Resources		<Ctrl><Shift><L> Or <Alt><C><C><S><N>	Display a Continuing Resource workform (formerly called Serials; includes both serials and integrating resources material types)
Create > Single Record > Maps		<Ctrl><Shift><M> Or <Alt><C><C><S><N>	Display a Maps workform
Create > Single Record > Mixed Materials		<Ctrl><Shift><I> Or <Alt><C><C><S><I>	Display a Mixed Materials workform
Create > Single Record > Scores		<Ctrl><Shift><C> Or <Alt><C><C><S><C>	Display a Scores workform
Create > Single Record > Sound Recordings		<Ctrl><Shift><R> Or <Alt><C><C><S><R>	Display a Sound Recordings workform
Create > Single Record > Visual Materials		<Ctrl><Shift><V> Or <Alt><C><C><S><V>	Display a Visual Materials workform
Note on creating single bibliographic records: By default, the workforms that open are based on AACR2 when you use the **Create** commands described above. You can set an option in **Tools > Options > RDA** to open workforms based on RDA instead. The setting also applies to creating bibliographic constant data.			
Create > Extract Metadata		<Alt><C><C><X>	Create records for electronic files (*.html, *.htm, *.doc, *.pdf, or *.mp3) by automatically extracting metadata from the file.

Cataloging menu item	Toolbar button	Default keystrokes and access keys	Use to...
Create > Constant Data		<Ctrl><Shift><N> Or <Alt><C><C><C>	Create a constant data record containing often used data to apply to bibliographic records
Show > By Online Save File Status		<Ctrl><O> Or <Alt><C><H><S>	Retrieve records from the bibliographic save file by workflow status, action status, and/or source status
Show > Default Online Constant Data		<Ctrl><Shift><F> Or <Alt><C><H><C>	Display current default constant data record
Show > By Local Save File Status		<Alt><C><H><L>	Retrieve records from the local bibliographic save file by workflow, action, and/or source statuses
Show > Default Local Constant Data		<Alt><C><H><D>	Display the current default local constant data record
Show > All GLIMIR Cluster Records		<Alt>C><H><G>	Display all bibliographic records that are in the same GLIMIR cluster as the displayed record (that is, all records for the same item that have different languages of cataloging) GLIMIR = Global Library Manifestation Identifier)
*Button is included on the default client toolbar. **Quick tool appears on the toolbar by default.			

Authorities menu

Authorities menu item	Toolbar button	Default keystrokes and access keys	Use to...
Search > LC Names and Subjects	*	<Shift><F2> Or <Alt><U><S><A>	Search online for Library of Congress name and subject authority records
Search > LC Names and Subjects History		<Alt><U><S><H>	Search online for superseded LC authority records (read-only access)
Search > Online Save File		<Alt><F3> Or <Alt><U><S><S>	Search for authority records in the online save file

Authorities menu item	Toolbar button	Default keystrokes and access keys	Use to...
Search > Online Constant Data		<Ctrl><Shift><H> Or <Alt><U><S><D>	Search for authority constant data records online
Search > Local Save File		<Shift><F3> Or <Alt><U><S><L>	Search for authority records in a specified local save file
Search > Local Constant Data		<Alt><U><S><C>	Search for authority constant records in a specified local constant data file
Search > Chinese Name Authority File		<Alt><U><S><H>	Search online for Chinese name authority records (read-only access)
Browse > LC Names and Subjects	*	<Alt><F2> Or <Alt><U><B><A>	Browse (scan indexes) for Library of Congress name and subject authority records
Create > Single Record > Blank		<Ctrl><Shift><K> Or <Alt><U><C><S><B>	Display a blank authority workform
Create > Single Record > Conference Name		<Alt><U><C><S><N>	Display a Conference Name authority workform
Create > Single Record > Corporate Name		<Alt><U><C><S><O>	Display a Corporate Name authority workform
Create > Single Record > Geographics		<Alt><U><C><S><G>	Display a Geographics authority workform
Create > Single Record > Personal Name		<Alt><U><C><S><P>	Display a Personal Name authority workform
Create > Single Record > Series		<Alt><U><C><S><S>	Display a Series authority workform
Create > Single Record > Uniform Title		<Alt><U><C><S><U>	Display a Uniform Title authority workform
Note on creating single authority records: By default, the workforms that open are based on AACR2 when you use the **Create** commands described above. You can set an option in **Tools > Options > RDA** to open workforms based on RDA instead. The setting also applies to creating authority constant data.			
*Button is included on the default client toolbar.			

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Authorities menu item	Toolbar button	Default keystrokes and access keys	Use to...
Create > Constant Data		<Ctrl><Shift><Q> Or <<Alt><U><C><C>	Create a constant data record containing often used data to apply to authority records
Show > By Online Save File Status		<Alt><U><H><S>	Search the online authority save file by workflow status
Show > Default Online Constant Data		<Ctrl><Shift><O> Or <Alt><U><H><C>	Display current default online constant data record
Show > By Local Save File Status		<Alt><U><H><L>	Search the local authority save file by workflow status
Show > Default Local Constant Data		<Alt><U><H><D>	Display the current default local constant data record
Show > LC Distributed Version		<Alt><U><H><V>	With a superseded authority record open, retrieve the distributed LC authority record with the same OCLC ARN
Show > LC Superseded Versions		<Alt><U><H><P>	With a distributed LC authority record open, retrieve superseded LC authority record(s) with the same OCLC ARN
*Button is included on the default client toolbar.			

Note on hidden menu: If you set an option to display the Hand Press Book menu in **Tools > Options > Hand Press Book**, the menu appears between the Authorities menu and the Edit menu. Anyone can display the menu, but by contract with OCLC, only members of the Consortium of European Research Libraries (CERL) can access the Hand Press Book database of records. For those who are profiled for Hand Press Book, see Checklist of Hand Press Book menus and commands (the list shows toolbar buttons for HPB menu commands that are included in the toolbar editor and explains briefly how to add the buttons to the toolbar.

Edit menu

Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Validate	*	<Shift><F5> Or <Alt><E><V>	Validate a displayed record
MARC-8 Characters > Verify		<Alt><E><8><V>	Validate MARC-8 characters for displayed record separately from record validation (displays invalid characters a different color; default = red)
MARC-8 Characters > Clear		<Alt><E><8><C>	Clears color from invalid characters
MARC-8 Characters > Convert to MARC-8 CJK		<Alt><E><8><I>	Convert invalid CJK character(s) to MARC-8 equivalent character(s)
Control Headings > All		<Shift><F11> Or <Alt><E><H><A>	Control headings in a displayed bibliographic record from WorldCat or the online bibliographic save file
Control Headings > Single Also available on right-click menu	*	<F11> Or <Alt><E><H><S>	Control the heading where the cursor is located in a displayed bibliographic record from WorldCat or the online bibliographic save file
Control Headings > Uncontrol Single Also available in right-click menu		<Ctrl><F11> Or <Alt><E><H><U>	Uncontrol the heading where the cursor is located in a displayed bibliographic record from WorldCat or the online bibliographic save file
Control Headings > Uncontrol All		<Alt><E><H><N>	Uncontrol all controlled headings in the displayed bibliographic record
Linking Fields > Link Fields		<Alt><E><K><L>	Link two fields that have the same tag number, one with (romanized) Latin script data (or client-supplied filler data **<>.**) and one with the same content in non-Latin script data.
Linking Fields > Unlink Fields		<Alt><E><K><U>	Unlink two fields with the same tag number
*Button is included on the default client toolbar.			

Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Cut, Copy, Paste > Undo Also available on the right-click menu		\<Ctrl\>\<Z\> Or \<Alt\>\<E\>\<U\>	Cancel the last change made (cancels one change at a time)
Cut, Copy, Paste > Cut Also available on the right-click menu	*	\<Ctrl\>\<X\> Or \<Shift\>\<Delete\> Or \<Alt\>\<E\>\<T\>	Remove the selected text and put in on the Windows clipboard
Cut, Copy, Paste > Copy Also available on the right-click menu	*	\<Ctrl\>\<C\> Or \<Ctrl\>\<Insert\> Or \<Alt\>\<E\>\<C\>	Copy the selected text to the Windows clipboard
Cut, Copy, Paste > Copy as Text		\<Alt\>\<E\>\<O\>	Copy the selected text to the Windows clipboard in plain text (ASCII) format for pasting into non-Unicode applications
Control Headings > Single Also available on right-click menu		\<F11\> Or \<Alt\>\<E\>\<H\>\<S\>	Control the heading where the cursor is located in a displayed bibliographic record from WorldCat or the online bibliographic save file
Control Headings > Uncontrol Single Also available in right-click menu		\<Ctrl\>\<F11\> Or \<Alt\>\<E\>\<H\>\<U\>	Uncontrol the heading where the cursor is located in a displayed bibliographic record from WorldCat or the online bibliographic save file
Control Headings > Uncontrol All		\<Alt\>\<E\>\<H\>\<N\>	Uncontrol all controlled headings in the displayed bibliographic record
Linking Fields > Link Fields		\<Alt\>\<E\>\<K\>\<L\>	Link two fields that have the same tag number, one with (romanized) Latin script data (or client-supplied filler data **<>.**) and one with the same content in non-Latin script data.
Linking Fields > Unlink Fields		\<Alt\>\<E\>\<K\>\<U\>	Unlink two fields with the same tag number

*Button is included on the default client toolbar.

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Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Cut, Copy, Paste > Undo Also available on the right-click menu		<Ctrl><Z> Or <Alt><E><U>	Cancel the last change made (cancels one change at a time)
Cut, Copy, Paste > Cut Also available on the right-click menu	*	<Ctrl><X> Or <Shift><Delete> Or <Alt><E><T>	Remove the selected text and put in on the Windows clipboard
Cut, Copy, Paste > Copy Also available on the right-click menu	*	<Ctrl><C> Or <Ctrl><Insert> Or <Alt><E><C>	Copy the selected text to the Windows clipboard
Cut, Copy, Paste > Copy as Text		<Alt><E><O>	Copy the selected text to the Windows clipboard in plain text (ASCII) format for pasting into non-Unicode applications
Cut, Copy, Paste > Paste Also available on the right-click menu	*	<Ctrl><V> Or <Shift><Insert> Or <Alt><E><P>	Paste the clipboard contents into the current record at the cursor location
Cut, Copy, Paste > Paste Unformatted Also available on the right-click menu		<Alt><E><C><S>	Paste all of the data copied from a Web site into a single field (automatically removes paragraphs and line breaks which cause the copied data to be pasted into separate fields)
Cut, Copy, Paste > Cancel Changes		<Ctrl><Shift><Z> Or <Alt><E><A>	Cancel all changes made to the current record since you last saved it
Cut, Copy, Paste > Delete Field Also available on the right-click menu		<Alt><Delete> Or <Alt><E><L>	Delete the field where the cursor is located
*Button is included on the default client toolbar.			

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Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Cut, Copy, Paste > Copy Field

Also available on the right-click menu | | <Alt><Insert>
Or
<Alt><E><I> | Copy the field where the cursor is located |
| Cut, Copy, Paste > Copy Control Number

Also available on the right-click menu | | <Ctrl><T>
Or
<Alt><E><Y> | Copy the OCLC control number to the Windows clipboard from the displayed record without having to highlight the number first. |
| Cut, Copy, Paste > Insert Blank Field > Above Current Field

Also available on the right-click menu | | <Shift><Enter>
Or
<Alt><E><B><A> | Insert a blank field above the field where the cursor is located |
| Cut, Copy, Paste > Insert Blank Field > Below Current Field

Also available on the right-click menu | | <Enter>
Or
<Alt><E><B><B> | Insert a blank field below the field where the cursor is located |
| Cut, Copy, Paste > Move Field > Up | | <Alt><Up Arrow>
Or
<Alt><E><M><U> | Move the field where the cursor is located up on position |
| Cut, Copy, Paste > Move Field > Down | | <Alt><Down Arrow>
Or
<Alt><E><M><D> | Move the field where the cursor is located down one position |
| Insert from Cited Record

Also available on the right-click menu | | <Alt><E><R> | Automatically insert data from a cited record that has a bibliographic connection to the record you are editing; builds a field (760-787, 800, 810, 811, or 830) based on the OCLC number of the cited record |

*Button is included on the default client toolbar.

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Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Attach Digital Content		<Alt><E><G>	Attach digital file(s) to a WorldCat record (when record is replaced, file(s) are uploaded to a specified collection in CONTENTdm)
Transliterate > Arabic Also available on the right-click menu		<Alt><E><T><A>	Automatically transliterate romanized data in the current field of an Arabic record into Arabic script (Romanized = Latin script representation)
Transliterate > Persian Also available on the right-click menu		<Alt><E><T><P>	Automatically transliterate romanized data in the current field of a Persian record into Arabic script (Romanized = Latin script representation)
Find/Replace	*	<Ctrl><F> Or <Alt><E><F>	Find and replace text in records
Derive > New WorldCat Record		<Ctrl><Alt><C> Or <Alt><E><E><N>	Derive a new bibliographic record from the displayed record Select fields to transfer by default in Tools > Options > Derive Record tab
Derive > New Constant Data		<Ctrl><A> Or <Alt><E><E><D>	Derive a new constant data record from the displayed record
Constant Data > Online > Apply Default		<Ctrl><A> Or <Alt><E><D><O><A>	Apply the default online constant data record to the displayed record
Constant Data > Online > Apply by Name		<Ctrl><U> Or <Alt><E><D><O><N>	Apply an online constant data record to the displayed record by entering the constant data name
Constant Data > Online > Apply from List		<Alt><E><D><O><L>	Select and apply an online constant data record from a list of online constant data records **Note:** Same as using **Cataloging > Search > Online Constant Data** (or <Ctrl><N>)
Constant Data > Online > Set as Default		<Alt><E><D><O><D>	Select the displayed online constant data record as the online default

*Button is included on the default client toolbar.

Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Constant Data > Local > Apply Default		`<Alt><E><D><L><A>`	Apply the default local constant data record to the displayed record
Constant Data > Local > Apply by Name		`<Alt><E><D><L><N>`	Apply a local constant data record to the displayed record by entering the constant data name
Constant Data > Local > Apply from List		`<Alt><E><D><L><L>`	Select and apply a local constant data record from a list of local constant data records **Note:** Same as using **Cataloging > Search > Local Constant Data** (or `<Ctrl><L>`)
Constant Data > Local > Set as Default		`<Alt><E><D><L><D>`	Select the displayed local constant data record as the local default
Guided Entry > Edit Also available on the right-click menu		`<Ctrl><Shift><X>` Or `<Alt><E><G><E>`	Open a guided entry window to edit an existing field 006, 541, or 583, depending on which field is current If the cursor is not located in an 006, 541, or 583 field, you get an error message
Guided Entry > Insert 006 > Books		`<Ctrl><Alt><Shift><B>` Or `<Alt><E><G><6><B>`	Insert Books 006 field in the current record below the current field
Guided Entry > Insert 006 > Computer Files		`<Ctrl><Alt><Shift><P>` Or `<Alt><E><G><6><P>`	Insert Computer Files 006 field in the current record below the current field
Guided Entry > Insert 006 > Continuing Resources		`<Ctrl><Alt><Shift><L>` Or `<Alt><E><G><6><O>`	Insert Continuing Resources 006 field in the current record below the current field Formerly called Serials; includes both serials and integrating resources material types
Guided Entry > Insert 006 > Maps		`<Ctrl><Alt><Shift><M>` Or `<Alt><E><G><6><M>`	Insert Maps 006 field in the current record below the current field
*Button is included on the default client toolbar.			

Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Guided Entry > Insert 006 > Mixed Materials		<Ctrl><Alt><Shift><I> Or <Alt><E><G><6><I>	Insert Mixed Materials 006 field in the current record below the current field
Guided Entry > Insert 006 > Scores		<Ctrl><Alt><Shift><C> Or <Alt><E><G><6><C>	Insert Scores 006 field in the current record below the current field
Guided Entry > Insert 006 > Sound Recordings		<Ctrl><Alt><Shift><R> Or <Alt><E><G><6><R>	Insert Sound Recordings 006 field in the current record below the current field
Guided Entry > Insert 006 > Visual Materials		<Ctrl><Alt><Shift><V> Or <Alt><E><G><6><V>	Insert Visual Materials 006 field in the current record below the current field
Guided Entry > Insert 541		<Alt><E><G><4>	Open a guided entry window to insert a 541 field in the current record below the current field (541 field is usually used to describe archival materials)
Guided Entry > Insert 583		<Alt><E><G><8>	Open a guided entry window to insert a 583 field in the current record below the current field (583 field is usually used to describe archival materials)
Enter Diacritics	ALA *	<Ctrl><E> Or <Alt><E><N>	Insert diacritics and special characters in the displayed record in the location of the cursor
Reformat	R *	<Ctrl><R> Or <Alt><E><R>	Re-sort tags in correct numerical order
Previous Record Area		<Shift><F6> Or <Alt><E><S>	Switch the cursor to the previous record area. Areas include: • Record Identification area • Variable fields • Fixed fields
Next Record Area		<F6> Or <Alt><E><X>	Switch the cursor to the next record area.
*Button is included on the default client toolbar.			

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Edit menu item	Toolbar button	Default keystrokes and access keys	Use to...
Classify		<Alt><E><L>	Click to use the prototype OCLC Classify Web service at: http://classify.oclc.org/ to supply a classification number automatically, based on the class scheme you select in a new variable field that you specify in **Tools > Options > Classify**.

*Button is included on the default client toolbar.

Action menu

Action menu item	Toolbar button	Default keystrokes and access keys	Use to...
Holdings > Update Holdings	*	<F8> Or <Alt><A><H><U>	Update holdings in WorldCat for the current record • Adds an original record to WorldCat • Adds your library's OCLC symbol to a record (original or existing)
Holdings > Produce and Update Holdings	*	<Shift><F7> Or <Alt><A><H><P>	Produce OCLC-printed catalog cards or accessions list and update holdings for the current record
Holdings > Alternate Produce and Update		<Alt><A><H><A>	Produce extra OCLC-printed catalog cards or cards for several holding libraries and update holdings for the current record
Holdings > Delete Holdings	*	<Shift><F8> Or <Alt><A><H><D>	Delete holdings in WorldCat for the current record
Add to Authority File		<Ctrl><Alt><A> Or <Alt><A><F>	Add an authority record you created to the LC authority file (requires NACO authorization)
Report Error		<Alt><A><E>	Send an error report to OCLC for an existing bibliographic record (unavailable for workforms)

*Button is included on the default client toolbar.

Action menu item	Toolbar button	Default keystrokes and access keys	Use to...
Submit for Review		<Alt><A><B>	Submit a bibliographic or authority record for review to any OCLC institution(s), specified by OCLC symbol(s)
Recall Submitted Record		<Alt><A><M>	Recall a record you submitted for review by removing the Review Status **Submitted** from the record
Lock WorldCat Record		<Alt><F8> Or <Alt><A><L>	Lock the current record in WorldCat
Release Record Lock		<Alt><F9> Or <Alt><A><K>	Release lock on the current record in WorldCat
Replace Record		<Alt><F10> Or <Alt><A><R>	Replace record in WorldCat
Replace and Update Holdings		<Alt><F11> Or <Alt><A><N>	Replace record and update holdings in WorldCat
Lock Linked Authority Record		<Alt><A><I>	Lock the associated authority record from a linked heading in a bibliographic record
Save Record to Online File		<Ctrl><Alt><V> Or <Alt><A><O>	Save the current record in the online bibliographic save file
Save Record to Local File		<F4> Or <Alt><A><S>	Save the current record in the default local bibliographic save file
Delete Record	*	<Ctrl><Alt><D> Or <Alt><A><E>	Delete the current record from the online file from which you retrieved it
Copy Record		<Alt><A><Y>	Copy the current local save file record to a local save file you specify
Move Record		<Alt><A><V>	Move the current local save file record to a local save file you specify
Export	*	<F5> Or <Alt><A><X>	Export records
Set Status		<Ctrl><Shift><S> Or <Alt><A><T>	Assign status(es) to a displayed record Or

			Remove My Status
*Button is included on the default client toolbar.			

Batch menu

Batch menu item	Toolbar button	Default keystrokes and access keys	Use to...
Enter Bibliographic Search Keys		<Alt><B><B>	Enter searches for retrieving records from WorldCat to send in a batch for immediate processing. Retrieved records are downloaded to your default local bibliographic save file
Enter Authority Search Keys		<Alt><B><A>	Enter searches for retrieving records from the LC authority file to send all at once for immediate batch processing. Retrieved records are downloaded to your default local authority save file
Holdings by OCLC Number		<Alt><B><H>	Enter or import OCLC numbers for records to batch set or delete holdings without having to first download the records
Process Batch		<Alt><B><P>	Process WorldCat and/or LC authority file searches and/or actions you have marked on records in the local bibliographic and/or authority save file for one or more local files you select
Note on options for batch reports: • View a specific batch report any time for the most current batch processed, using the commands listed below from the **Batch > View Reports** submenu. Set an option to display or print batch reports automatically as soon as a batch finishes in **Tools > Options > Batch** tab.			
View Reports > Bibliographic Search Report		<Alt><B><V><S>	Open a report for the most current batch WorldCat search you processed
View Reports > Bibliographic Record Action Report		<Alt><B><V><A>	Open a report for the most current batch actions you processed on bibliographic records
View Reports > Bibliographic Export Report		<Alt><B><V><X>	Open a report for the most current export actions you batch-processed on bibliographic records
View Reports > Label Print Report		<Alt><B><V><L>	Open a report for the most current label printing you batch-processed

Batch menu item	Toolbar button	Default keystrokes and access keys	Use to...
View Reports > Authority Search Report		<Alt><B><V><U>	Open a report for the most current LC authority file search you batch-processed
View Reports > Authority Record Action Report		<Alt><B><V><R>	Open a report for the most current batch actions you processed on authority record
View Reports > Authority Export Report		<Alt><B><V><P>	Open a report for the most current export actions you batch-processed on authority records
View Reports > Holdings by OCLC Number Report		<Alt><B><V><H>	Open a report for the most current update holdings actions by OCLC number you batch-processed

View menu

View menu item	Toolbar button	Default keystrokes and access keys	Use to...
Label	*	<F10> Or <Alt><V><L>	View and edit spine/pocket labels for the current record
Holdings > Default		<Ctrl><Shift><D> Or <Alt><V><H><D>	View holdings attached to the current record Use default locations display based on number of holdings
Holdings > All		<Ctrl><Shift><A> Or <Alt><V><H><A>	Display all holdings (locations attached to the current record)
Holdings > State		<Ctrl><Shift><T> Or <Alt><V><H><S>	Display state holdings (locations) attached to the current record
Holdings > Regional		<Ctrl><Shift><G> Or <Alt><V><H><R>	Display regional holdings (locations) attached to the current record
User Information		<Ctrl><Alt><U> Or <Alt><V><U>	View session identification, duration, and other information for the current online session (when online) or for the last session (when offline)

View menu item	Toolbar button	Default keystrokes and access keys	Use to...
Message of the Day		<Alt><V><M>	View the OCLC Message of the Day from the most recent logon
News		<Ctrl>>F5> Or <Alt><V><N>	View OCLC system news
OCLC Usage Statistics	(none)	<Alt><V><C>	Opens your default Web browser to the OCLC usage statistics page on the OCLC Web site; shows your Connexion statistics, based on your default authorization and OCLC institution symbol
Assigned Keys		<Alt><V><A>	View all assigned keystroke shortcut assignments and their source (file name)
OCLC Fixed Field >Top		<Alt><V><O><T>	Move the OCLC fixed field above the variable fields in record displays
OCLC Fixed Field > Bottom		<Alt><V><O><B>	Move the OCLC fixed field below the variable fields in record displays
OCLC Fixed Field > Display as Variable Field		<Alt><V><O><D>	Show OCLC fixed field in tagged (variable field) format
Status Bar	(none)	<Alt><V><R>	Show or hide the status bar
Toolbars > Client	(none)	<Alt><V><T>	Show or hide the main client toolbar that contains toolbar buttons for menu commands
Toolbars > WorldCat Quick Search	(none)	<Alt><V><W>	Show or hide the WorldCat quick search box on the toolbar for entering and sending a command line search or browse
Toolbars > Quick Tools	(none)	<Alt><V><Q>	Show or hide quick tools on the toolbar for using and managing text strings and user tools
Pinned		<Shift><F4> Or <Alt><V><P>	Pin the current record to keep it open or unpin the current record to close it
Align Right		<Alt><V><I>	Toggle alignment of Arabic or Hebrew script data in the current record right-to-left or left-to-right

*Button is included on the default client toolbar.

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View menu item	Toolbar button	Default keystrokes and access keys	Use to...
Navigate Records and Lists > Back	▣ *	<Shift><F9> Or <Alt><V><V><B>	View the previous record from a list
Navigate Records and Lists > Forward	▣ *	<F9> Or <Alt><V><V><F>	View the next record from a list
Navigate Records and Lists > Previous 100 Records	▣	<Ctrl><Alt><Shift><U> Or <Alt><V><V><V>	When search results from the specific kinds of searches exceed 100 records, view the previous 100 records (see "Record lists" for more information).
Navigate Records and Lists > Next 100 Records	▣	<Ctrl><Alt><Shift><V> Or <Alt><V><V><X>	View the next 100 records resulting from specific types of searches (see "Record lists" for more information).
Navigate Records and Lists > Previous Group	▣	<Alt><V><V><E>	When a WorldCat search results in a group list, open the previous group entry without returning to the group list window
Navigate Records and Lists > Next Group	▣	<Alt><V><V><G>	When a WorldCat search results in a group list, open the next group entry without returning to the group list window
List Type > Brief	▣	<Alt><V><Y><B>	When you view a truncated WorldCat search results list, switch the display to the brief list format
List Type > Truncated	▣	<Alt><V><Y><T>	When you view a brief WorldCat search results list, switch the display to the truncated list format
Sort by > Author	▣	<Alt><V><S><A>	Sort records in a list in alphabetical order by author
Sort by > Category	▣	<Alt><V><S><R>	Sort records in a list by category
Sort by > Constant Data Name	▣	<Alt><V><S><D>	Sort records in a list in alphabetical order by constant data name
*Button is included on the default client toolbar.			

View menu item	Toolbar button	Default keystrokes and access keys	Use to...
Sort by > Date		<Alt><V><S><E>	Sort records in a list in order of dates. Toggles between sorting from newest to oldest or oldest to newest
Sort by > Main Entry		<Alt><V><S><M>	Sort records in a list alphabetically by main entry
Sort by > Title		<Alt><V><S><T>	Sort records in a list alphabetically by title
*Button is included on the default client toolbar.			

Tools menu

Tools menu item	Toolbar button	Default keystrokes and access keys	Use to...
Text Strings		<Alt><T><S>	Create text strings for frequently used data and insert in records or workforms, or assign to a keystroke shortcut or user tool (supplements constant data)
Text Strings quick tool	**Quick toolbar alternative to the Text Strings command. Click the arrow and select a text string in the list to insert, or click **Manage** to open the Text String window. **Note:** Quick tools for text strings and user tools are a single unit for purposes of repositioning in the client window or showing/hiding toolbars (View menu).		
Keymaps		<Alt><T><K>	Customize keystroke shortcuts for using commands, macros, characters, and text strings
Macros > Manage		<Ctrl><Alt><Shift><G> Or <Alt><T><M><M>	Create, edit, organize, and run macros to automate client functions
Macros > Stop		<Ctrl><Alt><Shift><T> Or <Alt><T><M><S>	Stop running a macro
Macros > Pause Recording		<Alt><T><M><P>	Temporarily pause recording a macro with the ability to resume recording at the point where you paused
** Quick tools appear on the toolbar by default.			

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Tools menu item	Toolbar button	Default keystrokes and access keys	Use to...
Macros > Resume Recording		<Alt><T><M><E>	Resume recording a macro at the point where you paused
Macros > Stop Recording		<Alt><T><M><R>	Stop recording a macro when you are finished
Options		<Alt><T><O>	Open a window with tabs for setting options See Getting Started, "Customize Connexion client" or Basics, Set Options and Customize, "Set client options and customize - overview" for a list.
Profiles		<Alt><T><P>	Create, delete, or change default user profile (set of options and customizations) for those who need different settings to catalog for more than one library
Toolbar Editor	(none)	<Alt><T><E>	Access to all toolbar buttons to add or remove buttons from the toolbar (drag and drop)
Z39.50 > Connect		<Alt><T><Z><C>	Connects to your local system using a profile you set up in **Tools > Options > Z39.50**
Z39.50 > Search		<Alt><T><Z><S>	Search your local system for a record by entering its local record identification number If you haven't already entered settings for connecting to your local system, the client prompts you to do so
Z39.50 > Disconnect		<Alt><T><Z><D>	Disconnect from the Z39.50 connection By default, disconnection occurs after 20 min. of inactivity (see **Tools > Options > Z39.50** to change)
CJK E-Dictionary		<Alt><T><J>	Open a dictionary of Chinese, Japanese, and Korean characters supported in the client for cataloging to help select the correct character
Find in a Library		<Alt><V><L>	Display the current record in the Find in a Library service at WorldCat.org
** Quick tools appear on the toolbar by default.			

Tools menu item	Toolbar button	Default keystrokes and access keys	Use to...
Launch Local Holdings Maintenance		<Alt><T><L>	Open the Connexion browser, automatically log on,* and display the local holdings record(s) for the bibliographic record currently displayed in the client. Use the screen to modify local holdings information. *Logon uses your default authorization and password in **Tools > Options > Authorizations** or the authorization you assigned to the local file in **File > Local File Manager / Authorization**.
Launch WebDewey		<Alt><T><W>	Launch a Dewey session: Opens WebDewey, logs you on using your general default authorization and password (in Tools > Options > Authorizations), and opens the WebDewey search screen in a browser window. **Note:** Available only if your default logon authorization includes a WebDewey subscription.
Harvest Web Content	(none)	<Alt><T><H>	Open a Web browser screen for harvesting files from the Web
Review Harvested Content	(none)	<Alt><T><R>	Open a Web browser screen for retrieving and reviewing harvested files
** Quick tools appear on the toolbar by default.			

Tools menu item	Toolbar button	Default keystrokes and access keys	Use to...
User Tools > 1 through 10	**1** **2** **3** **4** **5** **6** **7** **8** **9** **10**	<Alt><T><T><1> <Alt><T><T><2> <Alt><T><T><3> <Alt><T><T><4> <Alt><T><T><5> <Alt><T><T><6> <Alt><T><T><7> <Alt><T><T><8> <Alt><T><T><9> <Alt><T><T><0>	Customizable toolbar buttons/shortcut keys: Carry out a command, run a macro, insert a diacritic or special character, or insert a text string you assign to a user tool. Ten user tools are available.
User Tools quick tool	****Quick toolbar alternative to the User Tools command. Click the arrow and select a user tool in the list, or click Manager to open the User Tools window.** 1...10 User Tools ▾ **Note:** Quick tools for text strings and user tools are a single unit for purposes of repositioning in the client window or showing/hiding toolbars (View menu).		
User Tools > Assign	1...10	<Alt><T><T><A>	Assign a user tool to a macro, menu item, diacritic or special character, or a text string. Customize default user tool description for tool tip and menu command pop-up description.
Check Spelling	ABC	<F7> Or <Alt><T><C>	Check spelling in the displayed record
** Quick tools appear on the toolbar by default.			

Tools menu item	Toolbar button	Default keystrokes and access keys	Use to...
RDA Toolkit		<Alt><T><D>	Open the RDA Toolkit description of the variable field where the cursor is located in a record or workform (available when online or logged off). **Notes:** • You must be a subscriber (see more information on the RDA Toolkit Web site at: http://www.rdatoolkit.org. • In the client, you must set options in Tools > Options > RDA
** Quick tools appear on the toolbar by default.			

Window menu

Window menu item	Toolbar button	Default keystrokes and access keys	Use to...
Cascade		<Alt><W><C>	Arrange open windows to overlap with title bars visible and with the current window on top
Tile Horizontally		<Alt><W><H>	Arrange open windows from left to right as non- overlapping tiles
Tile Vertically		<Alt><W><T>	Arrange open windows from top to bottom as non- overlapping tiles
Arrange Icons		<Alt><W><A>	Put icons for minimized windows in a row at the bottom of the main window
Close Window		<Ctrl><F4> Or <Alt><W><W>	Close the current record or list window
Close All		<Alt><W><S>	Close all client windows. Before closing any edited record, reminds you to save it if not already saved
[List of all open windows by name, numbered in the order you opened them]	(none)	<Alt><W><[window number]>	Make a specific record or list window the current window (topmost) by clicking its name or specifying its number

Help menu

Help menu item	Toolbar button	Default keystrokes and access keys	Use to...
Client Help	*	<F1> Or <Alt><H><H>	View Help. Two panes provided: • Left pane: navigate Help via buttons, tabs, and links • Right pane: view Help topics **Note:** To print a Help topic, right-click in the topic, and on the popup menu, click **Print**.
MARC Field Help Also available on the right-click menu	*	<Shift><F1> Or <Alt><H><M>	For bibliographic records, open Web browser to *Bibliographic Formats and Standards* description of current field For fixed field element in an authority record, open description in appendix C.3, Fixed Field Element Definitions, in the *OCLC Authority User Guide* For variable fields in an authority record, opens description in *MARC 21 Concise Format for Authority Data* on the Library of Congress Web site
Tutorial		<Alt><H><T>	Link to the Connexion tutorial on the OCLC Web site
Contact Support		<Alt><H><C>	Open a form to fill in and send via the internet to OCLC (connexion-support@oclc.org), or to a selected regional service provider, or to another email address that you specify
Useful Web Links > OCLC Connexion	(none)	<Alt><H><U><O>	Open your default web browser and display the Connexion home page on the OCLC Web site
Useful Web Links > Client Documentation	(none)	<Alt><H><U><D>	Open your default Web browser and display the Connexion client documentation page on the OCLC web site
Useful Web Links > Bibliographic Formats and Standards	(none)	<Alt><H><U><B>	Open your default Web browser to the main page of the OCLC Bibliographic Formats and Standards with links to chapters and field descriptions
Useful Web Links > OCLC Classify Web Service	(none)	<Alt><H><U><W>	Opens the prototype OCLC Classify Web service independently of the client
*Button is included on the default client toolbar.			

Help menu item	Toolbar button	Default keystrokes and access keys	Use to...
Client Known Problems	(none)	<Alt><H><U><K>	Open your default Web browser to the Connexion client known problems page on the OCLC Web site
Useful Web Links > WorldCat Statistics	(none)	<Alt><H><U><S>	Open your default Web browser and display the WorldCat Statistics page on the OCLC web site
Useful Web Links > WorldCat Record Change Request	(none)	<Alt><H><U><C>	Open your default Web browser and display the WorldCat Record Change Request form on the OCLC web site
Useful Web Links > WorldCat Record Merge Request	(none)	<Alt><H><U><M>	Open your default Web browser and display the WorldCat Record Merge Request form on the OCLC web site
Useful Web Links > Authority Record Change Request	(none)	<Alt><H><U><R>	Open your default Web browser and display the Authority Record Change Request form on the OCLC web site
Useful Web Links > Product Services	(none)	<Alt><H><U><P>	Open your default Web browser and display the Product Services page on the OCLC web site for access to: • Records and Reports • Macros • Scripts • Questions and Support • Software and Documentation
Useful Web Links > OCLC System Alerts	(none)	<Alt><H><U><L>	Open your default Web browser and display the System Alerts page on the OCLC web site
Useful Web Links > Access and Authorization Form	(none)	<Alt><H><U><A>	Open a Web form to add, change, or delete authorizations for OCLC cataloging and interlibrary loan (resource sharing)
License Agreement	(none)	<Alt><H><L>	View the Connexion client license agreement and copyright statement
About OCLC Connexion Client	(none)	<Alt><H><A>	View Connexion client version number and other identification information Also view client program modules currently running

*Button is included on the default client toolbar.

Right-click shortcut menus

Right-click in a record to open a popup shortcut menu to:

- Undo
- Cut

- Copy
- Paste
- Paste Unformatted
- Delete Field
- Copy Field
- Copy Control Number
- Control Single Heading*
- Uncontrol Single*
- Insert from Cited record*
- Edit with Guided Entry*
- Insert Unicode Control Characters > [submenu of characters listed below]**
  Note: These characters are available **only** on the right-click menu.
- Transliterate > Arabic [or Persian]*
- Right-to-left reading order*
- Link fields*
- Unlink fields*
- MARC Field Help
- RDA Toolkit

  Note: To open variable field descriptions in RDA Toolkit, you must be a subscriber, and you must set up in **Tools > Options > RDA**. (See details in Basics, Get Support and Information, "Use client Help.")

  *Commands marked with asterisks are available for bibliographic records only.

  **The Insert Unicode Control Characters submenu contains characters used to control display of bidirectional (mixed right-to-left and left-to-right) text in Arabic, Persian, and Hebrew records. Characters available are:

  —LRM Left-to-Right Mark
  —RLM Right-to-Left Mark
  —ZWJ Zero Width Joiner
  —ZWNJ Zero Width Non-Joiner
  —LRE Start of Left-to-Right Embedding
  —RLE Start of Right-to-Left Embedding
  —LRO Start of Left-to-Right Override
  —RLO Start of Right-to-Left Override
  —PDF Pop Directional Formatting

Except for the Insert Unicode Control Characters submenu commands (available only on the right-click menu), these commands are also on standard client menu lists.

Access keys (hot keys)

- Access keys (sometimes referred to as "hot keys") are underlined letters on menus, submenus, commands, and various selections and buttons in windows, which provide keyboard access when used with the Alt key.
- Press <Alt> displays the underlines

- Change a Windows option to keep the underline display on.
  Go to **Start > Control Panel > All Control Panel Items > Ease of Access Center > Make the keyboard easier to use**. Click to select the **Underline Keyboard shortcuts and access keys** check box.

- Use either keystroke shortcuts (default or customized) or the equivalent access keys.

Use access keys to select and send commands on menus

Press...	To do this...
<Alt><underlined letter in menu name><underlined letter in command name> Or <Alt><Underlined letter in menu name>, then <Down arrow>, and then <Enter>.	Open a menu, select a command, and send it.

  Example: To log off Connexion:

- Press <Alt><F><G>.
  Or
- Press <Alt><F> to open the File menu, then press <Down arrow> twice to select **Log Off**, and then press <Enter>.

Use access keys in windows

- Press <Alt><underlined letter of the item you want to select or carry out>.

  Example:
  Open the Logon window (**File > Log On**). The window opens with the focus in the **Authorization** text box.

  Press <Tab> to move the highlight to the **Password** text box to enter a password.
  Or
  Press <Tab> twice to move the focus to the **Authorizations** button, and then press <Enter> to open the Authorizations options tab to change and store the options for logging on.

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3. Default function keys

About function keys

- Function keys at the top of the keyboard (<F1>, <F2>, <F3>, etc.) are used along or combined with <Alt>, <Ctrl>, or <Shift> keys as shortcuts to carry out client functions.
  Example: <F2> opens the Search WorldCat window, if you are logged on, or the Logon OCLC window if not.
- Function key shortcuts are only a subset of preassigned keystroke shortcuts for client functions (see a complete list of default keystrokes for all commands in "Menus...").
- All functions in the client can be performed by the keyboard.
- Function keys and any other keystroke shortcuts can be reassigned (customized).

Function key template

To print a hard-copy template to place on your keyboard as a quick reference:

Action
Open the Function Key Template for OCLC Connexion Client at: <http://www.oclc.org/support/documentation/connexion/client/gettingstarted/keyboardtemplate.pdf> Print the template, cut and fold it, and place it above the function keys on your keyboard. Optional. Use the blank side to record any changes you make to the function key assignments if you customize them.

Function keys listed on menus

The client displays many of the default function keys next to the commands on menus. If you change the assignments, the client changes the display to the new key assignments, once you close and re-open the program.

Default function key assignments

The following table shows default function key assignments used alone or with <Alt>, <Ctrl>, or <Shift><Ctrl>, listed in keyboard order:

Key	Alone	Alt + key	Control + key	Shift + key
F1	Client Help	Logoff	Logon	MARC Field Help
F2	Search WorldCat	Browse LC Names and Subjects	Browse WorldCat	Search LC Names and Subjects

Key	Alone	Alt + key	Control + key	Shift + key
F3	Save Local Bib Save File	Search Online Authority Save File	Search Online Bib Save File	Search Local Auth Save File
F4	Save to Local File	Exit	Close Window	Pinned
F5	Export	[none]	News	Validate
F6	Next Record Area	[none]	Next Window	Previous Record Area
F7	Check Spelling	Delete Word	Delete to End of Cell	Produce
F8	Update	Lock Record	Print	Delete Holdings
F9	Forward	Release Lock	[none]	Back
F10	View Label	Replace	[none]	Print Label(s)
F11	Control Single Heading	Replace & Update Holdings	Uncontrol Single Heading	Control All Headings
F12	Print	[none]	[none]	Print List

The following tables show default function key assignments in order of menus and commands (excluding Batch and Windows menu commands, which do not have assigned default function keys):

File menu	Cataloging menu	Authorities menu	Edit menu
Logon **<Ctrl><F1>**	Search > WorldCat **<F2>**	Search > LC Names and Subjects **<Shift><F2>**	Validate **<Shift><F5>**
Logoff **<Alt><F1>**	Search > Online Save File **<Ctrl><F3>**	Search > Online Save File **<Alt><F3>**	Control Headings > All **<Shift><F11>**
Print **<Ctrl><F8>** **<Ctrl><P>**	Search > Local Save File **<F3>**	Search > Local Save File **<Shift><F3>**	Control Headings > Single **<F11>**
Print List **<Shift><F12>**	Browse > WorldCat **<Ctrl><F2>**	Browse > LC Names and Subjects **<Alt><F2>**	Control Headings > Uncontrol Single **<Ctrl><F11>**
Print Label(s) **<Shift><F10>**			Previous Record Area **<Shift><F6>**
Exit **<Alt><F4>**			Next Record Area **<F6>**

Action menu	View menu	Tools menu	Help menu
Update Holdings **<F8>**	Label **<F10>**	Check Spelling **<F7>**	Client Help **<F1>**
Produce and Update Holdings **<Shift><F7>**	News **<Ctrl><F5>**		MARC Field Help **<Ctrl><F1>**
Delete Holdings **<Shift><F8>**	Pinned **<Shift><F4>**		
Lock WorldCat Record **<Alt><F8>**	Back **<Shift><F9>**		
Release Record Lock **<Alt><F9>**	Forward **<F9>**		
Replace Record **<Alt><F10)>**			
Replace & Update Holdings **<Alt><F11>**			

Action menu	View menu	Tools menu	Help menu
Save Record to Local File **<F4>**	Forward **<F9>**	Check Spelling **<F7>**	MARC Field Help **<Ctrl><F1>**
Export **<F5>**			

4. Toolbars

About the toolbar

- When you install the Connexion client, default toolbars are already set up and displayed at the top of the client window.

    — **Default client toolbar:**
    Contains selected toolbar buttons for some of the most often used client commands (see list below). Toolbar buttons provide a single-click alternative to clicking menus and commands.

    To see a definition of a toolbar button on the toolbar, place the cursor over the button without clicking. A popup ToolTip names and menu and command.

    For example, the ToolTip for reads *CatalogingSearchWorldCat*.

    — **Quick tools:**
    - WorldCat quick search tool for command line searching:

    - Text strings list and Manage command to open the Text Strings window:
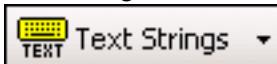
    - User tools list and Manage command to open the User Tools window:

    Note: For purposes of repositioning in the client window or showing/hiding, the text strings and user tools quick tools are a single unit.

Default client toolbar

The following table lists the buttons on the default toolbar (provided when you installed the client) and gives available keystroke shortcut alternatives. To see **all available** toolbar buttons, on the Tools menu, click **Toolbar Editor**, and scroll the list.

Toolbar button	Menu > submenu > command	Function key shortcut	Access key shortcut equivalent
	Cataloging > Search > WorldCat	<F2>	<Alt><C><S><W>
	Cataloging > Browse > WorldCat	<Ctrl><F2>	<Alt><C><B><W>

Toolbar button	Menu > submenu > command	Function key shortcut	Access key shortcut equivalent
	Cataloging > Search > Online Save File	<Ctrl><F3>	<Alt><C><S><S>
	Cataloging > Search > Local Save File	<F3>	<Alt><C><S><L>
	Authorities > Search > Online Save File	<Alt><F3>	<Alt><U><S><S>
	File > Log On	<Ctrl><F1>	<Alt><F><L>
	File > Log Off	<Alt><F1>	<Alt><F><G>
	Edit > Reformat	<Ctrl><R>	<Alt><E><R>
	Edit > Validate	<Shift><F5>	<Alt><E><V>
	Action > Update Holdings	<F8>	<Alt><A><U>
	Action > Product and Update Holdings	<Shift><F7>	<Alt><A><P>
	Action > Delete Holdings	<Shift><F8>	<Alt><A><D>
	Edit > Control Headings > Single	<F11>	<Alt><E><H><S>
	Action > Export	<F5>	<Alt><A><X>
	File > Print	<Ctrl><P> Or <F12> Or <Ctrl><F8>	<Alt><F><P>
	Edit > Cut	<Ctrl><X> Or <Shift><Delete>	<Alt><E><T>
	Edit > Copy	<Ctrl><C> Or <Ctrl><Insert>	<Alt><E><C>
	Edit > Paste	<Ctrl><V> Or <Shift><Insert>	<Alt><E><P>
	Edit > Find/Replace	<Ctrl><F>	<Alt><E><F>

Toolbar button	Menu > submenu > command	Function key shortcut	Access key shortcut equivalent
	Edit > Enter Diacritics	<Ctrl><E>	<Alt><E><N>
	Action > Delete Record	<Ctrl><Alt><D>	<Alt><A><E>
	View > Label	<F10>	<Alt><V><L>
	View > News	<Ctrl><F5>	<Alt><V><N>
	View > Back	<Shift><F9>	<Alt><V><B>
	View > Forward	<F9>	<Alt><V><F>
	Help > MARC Field Help	<Shift><F1>	<Alt><H><M>
	Help > Client Help	<F1>	<Alt><H><H>

Caution: If the default client toolbar contains new buttons when you upgrade to a later version, the new default button is not added to your toolbar. You can reset the toolbar to the default (**Tools > Toolbar**, click **Reset**), or use the toolbar editor to add new default buttons.

Check *Getting Started with OCLC Connexion*, "Update the client," whenever you upgrade for a list of client changes from the last version.

Quick tools

By default, the client also displays a WorldCat quick search box and quick tools for text strings and user tools along with the main client toolbar.

WorldCat quick search box

To use the WorldCat quick search box:

	Action
1	**Optional**. Log on to the system.
2	Click to place the cursor inside the WorldCat quick search box, and type a command line search or browse. Or Click the arrow directly to the right of the box to select from a search history list. **Note:** The client keeps a list of all searches (not limited to the last 10), but does not retain them after you close the program.
3	Click the search icon, , or press <Enter> to send the search. Note: If you did not log on before sending the search, the client prompts you to log on.

	Action
4	**Optional.** To clear the search history list, click the arrow directly to the right of the search icon, and then click **Clear WorldCat Search History**. **Result:** The client retains only the most recent search you typed in the quick search box. When you close and re-open the client, all searches are cleared from the quick search box.

Text strings quick tool

To use the text strings quick tool:

	Action
1	Click the arrow on the right of the text strings quick tool, and in the list, select the text string you want to insert at the cursor location in the current record. Text strings are listed by the descriptions you assign when you create them.
2	**Optional.** Click the quick tool name **Text Strings** or its icon, or in the list, click **Manage** to open the Text Strings window where you can assign or unassign text strings or view or print text string assignments. See Basics, Set Options and Customize, "Create custom text strings" for more information.

User tools quick tool

To use the user tools quick tool:

	Action
1	Click the arrow to the right of the user tools quick tool, and in the list, select the user tool you want to apply.
2	**Optional.** Click the quick tool name **User Tools** or its icon, or in the list, click Manage to open the User Tools window to assign or unassign user tools or to view or print user tool assignments. See Basics, Set Options and Customize, "Assign custom user tools" for more information.

Show or hide toolbars

By default, all toolbars are displayed. To toggle between hiding or re-displaying:

Action
Click **View > Toolbars**, and then click **Client** or **WorldCat Quick Search** or **Quick Tools**. A check mark indicates which toolbar(s) are displayed. **Note:** For purposes of displaying or hiding, the text strings and user tools quick tools are a single unit.

OCLC

Show toolbar on one line or two

	Action
1	Click the arrow on the main client toolbar (located at the right end if toolbar is horizontal or on bottom if toolbar vertical): The drop-down shows any overflow toolbar buttons and provides a command to toggle between showing the main toolbar on one row or two:
2	Click **Show buttons on two rows** (**default:** the client displays the toolbar on one row). Or If you previously displayed the toolbar in two rows, click **Show buttons on one row** to switch back. The client keeps your setting each time you re-open the program or upgrade to another version.

Re-position toolbars

Use drag and drop to re-position toolbars:

- Horizontally at the top or bottom (above the status bar, if the status bar is displayed) or vertically at the right or left of the client window (**default** position: top).
- In relation to each other within the top, bottom, right, or left location.

	Action
1	Move the cursor over the "grab bar" of a toolbar. If a toolbar is at the top or bottom of the client window, the grab bar is on the left; for example, . If a toolbar is at the right or left, the grab bar is at the top. **Note:** For purposes of repositioning, the quick tools for text strings and user tools are a single unit.
2	When the cursor becomes a large pointer (↑), click and hold the grab bar, and then drag and drop the toolbar to a different position. **Result:** The client retains the positions of toolbars when you close and reopen the program and when you upgrade to a new version.

Note: You cannot re-position toolbars if the toolbar edition is open (**Tools > Toolbar Editor**).

5. Status bar

What is status information?

- The client status bar shows status information for the current logon sessoin and/or the current (displayed) record.
- Record status information is stored only in the working copy of records saved in bibliographic save file. (**Exception:** the status for Report Error is not stored when you save a record.) Statuses are not retained in the WorldCat record.
- The function of showing record statuses is to assist you as you manage and process records.
- For a displayed bibliographic record, the status bar shows:
  —Action statuses:
    Shows whether any of the following actions you took on a record were completed (**C**) or failed (**F**) or are ready (**R**) for batch processing:
    Delete Holdings
    Export
    Label [print]
    Produce
    Submit
    Replace
    Report Error (status not saved with record; unavailable for batch)
    Update Holdings
    Validate (unavailable for batch)

    These statuses are supplied by the system.

  —Source of the record:
    Shows the origin of the record:
    Derived
    Extracted
    Imported
    OCLC
    Workform

    These statuses are supplied by the system.

  —My Status:
    Shows status you entered (**Action > Set Status**) or set as default (**Tools > Options > My Status tab**) using free text (up to 40 characters). Available for online and bibliographic save file records and constant data.

  —Workflow status:
    You can select from the following system-supplied list:
    Completed

     In Process (system-supplied default)
     In Review
     New

   —Other information, including:
     Record number (of the total number of records)
     Institution symbol (bibliographic records)
     Editing status
     Editing mode (insert or overwrite)
     If logged on: Countdown (in minutes or seconds) to system-timed-out logoff for inactivity

- For a displayed authority record, the status bar displays:
  —Action statuses:
    Shows whether the following actions you took on the authority record were completed (**C**) or failed (**F**) or are ready (**R**) for batch processing:
    Export
    Add
    Submit
    Replace
    Report Error (status not saved with record; unavailable for batch)
    Validate (unavailable for batch)

    These statuses are supplied by the system.

  —Workflow status:
    Shows one of the following:
    Completed
    Imported (system-supplied only)
    In Process (system-supplied default)
    In Review
    New

  —My Status:
    For local authority save file only. Shows a note or identifier you entered (**Action > Set Status**) or set as default (**Tools > Options > My Status tab**) using free text (up to 40 characters).

  —Other information (same as for bibliographic records)

  Note: When you lock WorldCat bibliographic and authority records, the word Locked appears in the record information area. Locked status is not in the status bar.

Show or hide the status bar

The status bar shows at the bottom of the client main window, unless you hide it:

Action
To toggle between showing or hiding the status bar, click **View > Status Bar**. A check mark indicates that the status bar is displayed. No check mark indicates that the status bar is hidden. **Default:** The client displays the status bar.

Status bar description

The following table describes information contained in each area of the status bar (the areas are numbered in the order in which they appear only for reference; the areas are **not** numbered in the client interface):

Order of area	1	2	3	4	5
Example	*Delete Holdings-C*	*Export-C*	*Label-C*	*Produce-C* or *Add-F*	*Submit-R*
Shows	Action status for Delete Holdings: C=Completed F=Failed [blank]=not done R=Ready (batch)	Action status for Export: C=Completed F=Failed [blank]=not done R=Ready (batch)	Label print status: C=Completed F=Failed [blank]=not done R=Ready (batch)	Action status for Produce or Add: C=Completed F=Failed [blank]=not done R=Ready (batch)	Action status for Submit (peer review) C=Completed F=Failed [blank]=not done R=Ready (batch)
Shows for record type	Bibliographic record (Blank for authority record)	Bibliographic or authority record	Bibliographic record (Blank for authority record)	Bibliographic record (Produce) Or Authority record (Add)	Bibliographic or authority record

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Order of area	6	7	8	9	10
Example	*Replace-C*	*Report Error-C*	*Update Holdings- C*	*Validate-F*	*Source-OCLC*
Shows	Action status for Replace: C=Completed F=Failed [blank]=not done R=Ready (batch)	Report error status: C=Completed F=Failed [blank]=not done **Note:** Status shows only while record is open. Not saved with record	Action status for Update Holdings: C=Completed F=Failed [blank]=not done R=Ready (batch)	Action status for Validate: C=Completed F=Failed [blank]=not done	Source status * of the record: Derived Extracted Imported OCLC Workform
Shows for record type	Bibliographic or authority record	Bibliographic or authority record	Bibliographic record	Bibliographic or authority record	Bibliographic record

Order of area	11	12	13	14	15
Example	15 of 100	*My Status- Ready for review*	*Workflow Completed*	*Inst-OCL*	*Edit*
Shows	Record number of total number of records retrieved Number shows for record selected in list or for record displayed from list For WorldCat group list, shows number of selected group of total number of group entries	Custom status you assign to help manage saved records: Up to 40 characters of free text	Workflow status for bibliographic records: Completed In Process In Review New Needs DA Record* DA Record Complete* Workflow status for authority records: Completed Imported** In Process In Review New Responded**	Institution symbol associated with record when it is retrieved or imported	Editing status: Record has been edited (or this area blank if not edited) Edit status is retained until record is saved

Order of area	11	12	13	14	15
Shows for record type	Bibliographic or authority record	Bibliographic record or constant data Authority record in local save file or local constant data only	Bibliographic or authority record	Bibliographic record	Bibliographic or authority record

*Needs DA Record and DA Record Complete are Connexion browser workflow statuses only (DA = Digital Archive).

**System-supplied only note on Responded: NACO activities available in the browser, not yet available in the client.

Order of area	16	17
Example	INS	15:40
Shows	Editing mode: INS=Insert mode: typed characters are inserted OVR=Overwrite mode: typed characters replace existing ones	Inactivity timer countdown in minutes and seconds: System logs you off after 39 minutes (default), or after the number of minutes you set in Tools > Options> General tab, when you have not interacted during that time.
Shows for record type	Any window type	Any window type, but countdown shows only when logged on

49
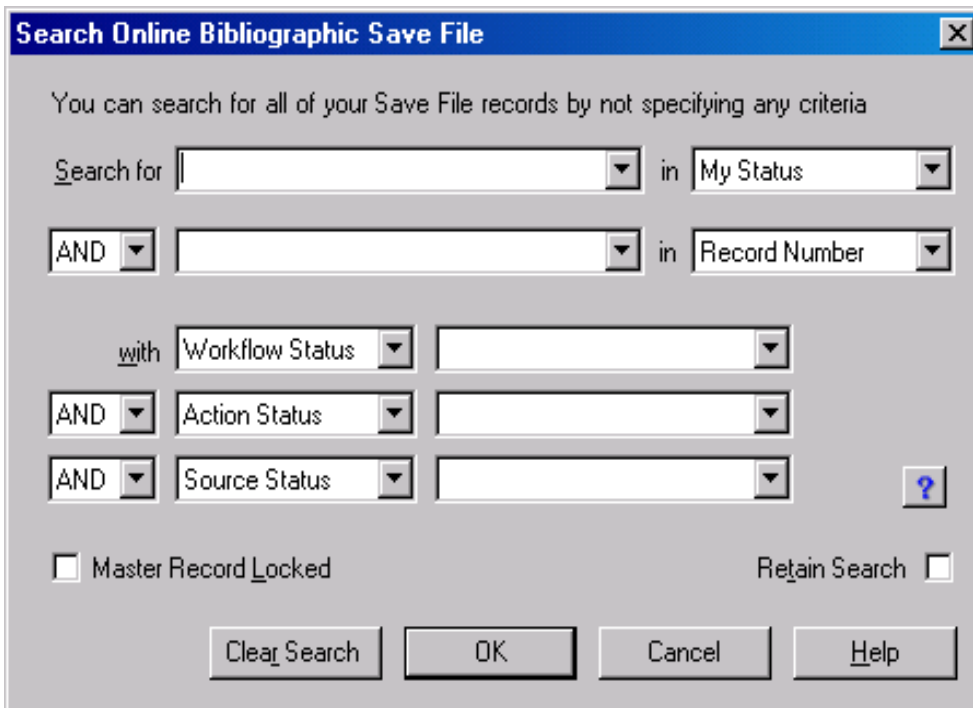
6. Client windows

What is a window?

Client windows (also called "dialogs" or "screens") open when you click a Connexion client command on a menu or in another window. You use windows to complete a task by making selections, entering data, and clicking buttons. (Note: OCLC Connexion documentation uses the term "windows" for the Connexion client and the term "screens" for the Connexion browser.)

Example: How to use the Search Online Bibliographic Save File window

To search the online bibliographic save file, on the Cataloging menu, you click Search > Online Save File, or click ![icon], or press <Ctrl><F3>. The following window opens:

Use the window to specify the criteria for the search and click **OK** to send the search to the system.

Click **Help** or press <F1>. A "context-sensitive" Help topic opens a topic that describes each feature of the displayed window and gives a basic procedure for using the window and a list of tasks you can do.

If, for example, you need a quick check on how to use the Boolean operators **AND**, **OR**, and **NOT** to combine search terms in the online bibliographic save file window:

Action
Click **Help**, or press <F1>. In the Search Online Bibliographic Save File window Help topic, scroll to the third row in the "Features" table for a description of how the Boolean operators combine search terms.

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Keyboard shortcuts for using client windows

Press these keys ...	To do this ...
<Tab> Or <Shift><Tab>	Move to the next item Or Move to the previous item **Notes:** • Keep pressing <Tab> or <Shift><Tab> to cycle forward or backward through each item of the window. • When a window opens, generally the cursor is located in the first text box or other item, and one of the buttons (usually **OK** or **Cancel**) is preselected; its outline is highlighted and the action is carried out when you press <Enter>).
<Spacebar>	Choose a selected item
<Alt><Down arrow>	Open or close a selected list
<Up or down arrows>	Move among items in a list
<Home> or <End>	Move to the beginning or end of a line or list
<Ctrl><Right arrow> or <Ctrl><Left arrow>	Move to the right or left by one word in a text box
<Right arrow> or <Left arrow>	Move to the next or previous check box
<Enter>	Carry out the command on the selected command button
<Esc> or <Alt><F4>	Cancel the actions and close the window (does not save changes)
<Alt><Access key for specific features of windows> **Note:** Access keys (sometimes referred to as "hot keys") are underlined letters in labels of window features which provide keyboard assess to that features when used with Alt key. Press <Alt> if needed to see the underlines.	Make a selection, use a button, or do other actions unique to the window **Example:** In the Logon OCLC Connexion window (**File > Log On**), to use the **Setup Authorization** button, press <Alt><S>. The Authorization option tab opens.

7. Records

Edit in MARC template view

The Connexion client displays records in one view only: in a MARC template.

- The template displays data in cells that enclose field number, each indicator, and field data separately.
- When you enter data in a field, the cursor automatically moves from the tag cell to the first indicator cell, to the second indicator cell, and then to the field data cell as you enter data in each.

  You do not need to space or tab from cell to cell, unless you want to skip to the next cell without entering data (using <Tab>).

- When you click to place the cursor in a cell that has a set number of characters (tag, indicator, of fixed field element), the client automatically highlights the entire contents of the cell if it contains data, since you cannot enter additional characters without deleting existing characters.

  If you want to change only one character of several in one of these cells (for example, you want to change one number in the tag), click to highlight the contents of the tag cell, then click again to place the cursor before or after the particular number you want to replace, and then edit.

- When you click to place the cursor in a variable filed cell, the client does not highlight data. You can double-click a word to highlight it or triple-click to highlight all data in the field, just as you do in a word-processing program.
- Otherwise, you **edit the data as though it is continuous text**. For example, if you copy an entire field and paste it into a blank field, the client formats the data correctly, putting the tag number, indicator values, and field data in the appropriate cells. You do not have to copy and paste the data one cell at a time.

  Note on controlled heading fields. If a record contains a controlled heading, the heading is a link to the controlling authority record. When you click the field, the associated authority record opens.

  — If you need to place the cursor in a controlled heading field, for example, to copy text or add a line, to keep from activating the link, click in the tag or indicator cells.
  — If you need to edit the controlled heading itself, you must first uncontrol it (**Edit > Control Headings > Uncontrol Single**).

- Navigate and edit records using the mouse (click menu commands or toolbar buttons) or using keystroke shortcuts.
- For help with any specific field or fixed field element, the client gives you direct access to descriptions from the Web versions of *Bibliographic Formats and Standards* (for bibliographic records) and *Authorities: Formats and Standards* (for authority records). With the cursor in a field or fixed field element, on the Help menu, click **MARC Field Help**, or click , or press <Shift><F1>.
  Or

Right-click in the field, and on the popup menu, click **MARC Field Help**.

For more information about editing techniques and tools, see Cataloging, Edit Bibliographic Records or Authorities, Edit Authority Records.

Note: The following two types of records are read-only; you cannot edit or take actions on these records, but you can copy and paste from them or print the records: authority history records and Chinese name authority records.

Authorizations for record actions and editing

The kinds of editing you can do in records is determined by your logon authorization. The authorization number you use to log on to the OCLC system is associated with your OCLC cataloging profile. The authorization number tells Connexion what you are authorized to do.

For detailed lists of actions you can take by authorization type, see Cataloging, Edit Bibliographic Records, "Authorization levels and cataloging capabilities."

Three record areas

The record display is divided into three areas: the record identification area, the fixed field, and variable fields.

- Record identification area:
  — Always displays at the top
  — Contains:
    — OCLC number (bibliographic record) or ARN (authority record)
    — For bibliographic records:

      A holdings statement specifying whether your library has holdings on the item and whether local holdings records are attached.

      Note for records saved to local file: The holdings statement remains with a record saved to a local bibliographic file, even though holdings may be added to the record online after you save it. The client updates the holdings count when you take an action on the record online.

  — GLIMIR information (Global Library Manifestation Identifier):

    Displays the total number of holdings your library has on all records in the GLIMIR cluster to which the record belongs.

    (A GLIMIR cluster is a group of parallel records in WorldCat that describe the same item using different languages of cataloging.)

    And

    Displays the number of other library holdings in the GLIMIR cluster of [X], where X is the total number of records in the cluster.

Notes:

(1) GLIMIR information is displayed in WorldCat or save file (local or online) bibliographic records, whether or not you have the option selected in the Search WorldCat window to **Display using GLIMIR clustering**.

(2) With a WorldCat or save file record displayed, you can view all records belonging to the cluster that includes

Click **Cataloging > Show > All GLIMIR Cluster Records**.

(3) Because records in a GLIMIR list are representative only, you can select only one at a time.

(4) To take actions on the representative record or any other record in a GLIMIR list, you must click the representative record to display all records in the cluster.

— Lock status (*Locked* appears if you locked the WorldCat record)

— For save file records, save file number, and if the record is in the online save file.

— For LC authority records, an *In Distribution* label for records that NACO participants have added or replaced in the LC authorities file; the label displays while the records are actually in the LC distribution cycle (have a "NACO lock"), until LC distributes them.

— For an LC authority history record, displays:

~ A unique timestamp

~ *Deleted Record* when the corresponding distributed authority record (has the same ARN) was deleted from the LC authority file

— You cannot modify the data, but you can copy the data

— You can use **Edit > Copy Control Number** (or <Ctrl><T>) to copy the OCLC number or ARN without first selecting it in the record

- Fixed-field area:
  — Contains codes for information about an item that facilitates retrieval and data manipulation.

  — Modify data in the fixed field by changing the codes.

  - Type a value for a fixed field element.

  Or

  - Select a value from the drop-down list for each fixed-field element (displays when fixed field display is set to **Top** or **Bottom in View** > **OCLC Fixed Field**). Each list contains valid values depending on the MARC format of the record.

Or

- If you never use the lists, clear the display of fixed field lists in **Tools > Options > Record Display**.

— Select the position of the fixed-field in the record display (top or bottom) or display it as variable fields LDR (leader), 001, 005, and 008 (default: fixed field displays at the top of the record).

— For bibliographic records, contains a format list in the upper left corner. You can change the fixed field for a record to another format (for example, from Books format to Sound Recordings format) by selecting from the list.

— **MARC field Help**. You can click the name of an element in the fixed field (or tab to the name and press <Enter>) to open a description showing valid codes.

- For bibliographic records, the client opens your default browser to the appropriate description in *OCLC Bibliographic Formats and Standards*.

- For authority records, the client opens a description in *OCLC Authorities: Formats and Indexes*.

- Variable fields area:
— Contains a three-digit numerical tag that identifies the field, up to two single-digit indicators, and one or more subfields, preceded by subfield codes, of variable length containing textual information about the item.

— You can edit the data using text editing techniques such as adding blank fields, moving fields up or down one position, deleting highlighted data or complete fields, cutting or copying and pasting data or complete fields, jumping to the next or previous subfield or cell, and rearranging the order of the fields.

— URLs in records are hot links. You can click the URL to open the Web site in your default browser.

— You can open a MARC field description for the field where the cursor is located:
On the Help menu, click **MARC Field Help**, or click , or press <Shift><F1>.

For bibliographic records, the client opens your default browser to the appropriate description in *OCLC Bibliographic Formats and Standards*.

For authority records, the client opens the appropriate description in *OCLC Authorities: Formats and Indexes*.

To move the cursor from one record area to another in a displayed record:

Action
On the Edit menu, click **Previous Record Area** (or press <Shift><F6>)
Or
Click **Next Record Area** (or press <F6>).

Types of records (keep open at the same time)

The client distinguishes unique record types. You can keep one of each type of record open at the same time without taking any special steps. The client treats the following as separate record types:

Record type	Source of record
WorldCat record	Retrieved from WorldCat via: **Cataloging > Search > WorldCat** or **Cataloging > Browse > WorldCat**
Online bibliographic save file record	Retrieved from the online bibliographic save file via: **Cataloging > Search > Online Save File**
Local bibliographic save file record	Retrieved from a local bibliographic save file via: **Cataloging > Search > Local Save File**
Bibliographic workform	Opened from: **Cataloging > Create > Single Record > [format]** Or from: **Edit > Derive > New Record**
Online bibliographic constant data record	Retrieved from the online constant data file via: **Cataloging > Search > Online Constant Data**
Local bibliographic constant data record	Retrieved from a local constant data file via: **Cataloging > Search > Local Constant Data**
Bibliographic constant data workform	Opened from: **Cataloging > Create > Constant Data**
LC authority record	Retrieved from the LC authority file via: **Authorities > Search > LC Names and Subjects** or **Authorities > Browse > LC Names and Subjects**
LC authority history record superseded **Note:** Records are read-only	Opened from: With a distributed LC authority record open: **Authorities > Show > LC Superseded Versions** Or **Authorities > Search > LC Names and Subjects History** Or **Authorities > Browse> LC Names and Subjects History**
Online authority save file record	Retrieved from the online authority save file via: **Authorities > Search > Online Save File**
Local authority save file record	Retrieved from a local authority save file via: **Authorities > Search > Local Save File**
Authority workform	Opened from: **Authorities > Create > Single Record > [format]**
Online authority constant data record	Retrieved from the online authority constant data file via: **Authorities> Search > Online Constant Data**
Local authority constant data record	Retrieved from a local authority constant data file via: **Authorities> Search > Local Constant Data**
Authority constant data workform	Opened from: **Authorities > Create > Constant Data**
Chinese name authority record	Opened from: **Authorities > Search > Chinese Name Authority File**

OCLC

To keep multiple records **of the same type** open, you must pin the record windows open using **View > Pinned**.

Record display features

- **Title bar**. Shows the source of the record and gives title information from field 245 for bibliographic records or heading information from field 1xx for authority records
  Example:
  Online WorldCat: Gone with the wind cook book
  LC Names and Subjects: Bookplates
- **Visual editing indicators**. Helps you see which fields have been edited and which is the current field (the field where the cursor is located):
  — To show which field is current, the client outlines it with a current field indicator box.

  — To show variable fields you edited, the client marks each edited field with a ▶ symbol.

  Note: If you control a heading and the text of the heading remains unchanged, the field is not marked with the ▶ symbol.

  — To show that you edited the fixed field, a single ▶ symbol appears next to the Type element, but only when the fixed field displays at the top of the bottom of the record (View > OCLC Fixed Field > Top or Bottom).
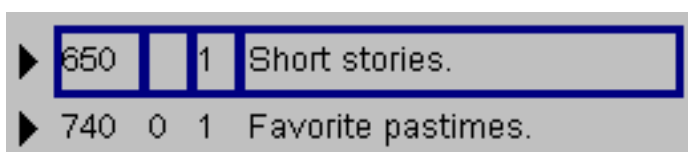
  This figure shows that:
  - The 650 field is active.
  - Both the 650 and 740 fields have been edited.

  — To show fields that contain automatically generated data, the client marks the fields with the symbol ▷. The client generates data when you:
  - Set an option in **Tools > Options > International** and auto-transliterate fields in WorldCat Arabic records (automatically adds Arabic script data to all interactively retrieved WorldCat records that have the language code ARA but no field 066).
  - Create a preliminary record for an electronic resource using **Cataloging > Create > Extract Metadata**. The client uses ▷ to mark fields containing "best guess" data generated by an analysis of text in the file. The client does not mark fields with data extracted exactly as found in metadata coded tags or in properties of the files.

    Note: If you edit a field marked with ▷, the mark changes to ▶.

  — To **show invalid non-Latin script characters** when you use **Edit > MARC-8 Characters > Verify**, the client displays them in red by default. Change the default color in **Tools > Options > Record Display**.

— To **show CJK characters converted to MARC-8** when you use **Edit > MARC-8 Characters > Convert to MARC-8 CJK**, the client displays them in green by default. Change the default color in **Tools > Options > Record Display**.

— **Edited fields remain marked** until you take final actions or use Control All Headings. Note that editing marks are not retained after you replace a WorldCat record.

- **Status bar**. Displays statuses and other information, unless you hide the status bar (**View > Status Bar**). For details, see "Status bar."
- **URLS**. Display as hot links that you can click to open the associated Web page in your default browser.
- **Institution name in 040**. Move the mouse over the OCLC institution symbol in field 040 to display the institution name. If the name is unavailable, the client gives you a message:
  — If the message says that the symbol
- **Subfield delimiter**. In Connexion client, subfield delimiters appear as a double dagger (‡), even in the Control Headings window. Always use ‡ as the subfield delimiter (default shortcut keystroke to enter in records is <Ctrl><D>).
- **Paired non-Latin script and Latin script fields.** The client visually links parallel fields that contain equivalent non-Latin script and romanized data with brackets.

For editing commands, see Edit Bibliographic Records, "Text editing commands" and for using the keyboards instead of the mouse, see "Default keystroke shortcuts for editing records."

Navigate among records and lists

When multiple records and lists are open, use commands on the View and Window menus to navigate among the open windows. The following is a list of possible navigation techniques:

- Use keystroke shortcuts to toggle between two open windows or cycle through all open windows (records and lists) in sequence: Press <Ctrl><Tab> or <Ctrl><F6>
- Cascade windows and cycle through to view them sequentially: Press <Ctrl><Tab> or <Ctrl><F6>
- Tile windows vertically or horizontally to view simultaneously:

	Action
1	On the Window menu, click **Cascade**. Result: Open lists and records line up behind each other with their title bars visible. - Record title bars show record source and title information from field 245 for bibliographic records or heading information from field 1xx for authority records. - List title bars show the source of the search results.
2	Click a title bar to make a window the current window. Or Press <Ctrl><Tab> repeatedly to view each open list and record window.

- Minimize windows and arrange icons:

Action
Click _ in each window to minimize, and on the Window menu, click **Arrange Icons** or press <Alt><W><A>. The minimized window icons line up in a row.

- Cycle through records using the **Forward** and **Back** commands (View > Navigate Records and Lists menu/submenu).

Display and move through the records in a list without returning to the list:

Action
On the View menu, click **Navigate Records and Lists > Back or Forward**, or click or , or press <Shift><F9> or <F9> to open the previous or next record, respectively, in the list of records. **Tip:** To keep track of where you are in the list, check the record's status bar. The status bar area in the lower left corner (see description of area 10 in "Status bar") shows the list-assigned record number for the displayed record and the total number of records in the list. **Note: Forward** and **Back** commands are not available for OCLC system news search results.

Or display and move through **selected** records in a list without returning to the list:

	Action
1	In the list, select the records you want to view: To select a group of adjacent records, click to select the first entry of the group. Then press and hold <Shift> and click the last entry. Or To select nonadjacent records, click to select the first record. Then press <Ctrl> as you select other records individually.
2	Press <Enter>. The first selected record opens.
3	To view the next selected record, on the View menu, click **Navigate Records and Lists > Forward**, or click , or press <F9> to open the next selected record. **Tip:** To keep track of where you are in the list, check the lower left corner of the status bar to see the record number of the total number of records in the list.
4	Optional. To view the previous selected record, on the View menu, click **Navigate Records and Lists > Back**, or click , or press <Shift><F9>. **Note:** Multiple selection is available for all lists except those for constant data search results and browse results for WorldCat or the LC authority file.

Note: Forward and **Back** commands are not available for OCLC system news search results.

- For WorldCat group lists: To open the next or previous group list entry (another list) without returning to the group list window:

Action
To open the next group entry (list), on the View menu, click **Navigate Records and Lists > Next Group**, or press <Alt><V><V><G>. Or To open the previous group entry (list), on the View menu, click **Navigate Records and Lists > Previous Group**, or press <Alt><V><V><E>.

Change record display

- You can change how data longer than three or four lines displays in variable fields. By default, the client expands variable field cells as needed to show all of the data. You can show only the first three or four lines of data in a field and have the client add a vertical scroll bar to view the data.

- You can change the colors of background, fields, and text to help distinguish simultaneously opened bibliographic records from authority records.

  Tip: If you prefer looking at records in continuous text rather than in cells, you can select the same color for record background and field background (eliminates cell borders in the display).

- You can also change the font type and size for displaying and printing records and lists.

Print records

Action

With a record open, on the File menu, click **Print**, or click   , or press <Ctrl><P>, or press <Alt><F><P>.
Or
Available for local save file or local constant data lists only:
Select records in a list that you want to print (hold <Shift> and click for adjacent records or hold <Ctrl> and click for non-adjacent records). On the File menu, click **Print**, or click 🖨, or press <Ctrl><P>.
 	
Results:
  • If you click 🖨 or press <Ctrl><P>, printing occurs immediately using your default Windows printer, unless you selected to print records to a file (**Tools > Options > Printing**).
 	
    Note: Clicking 🖨 always prints a record. If a list is displayed, the button prints the selected record.
 	
  • If you use the **File > Print** or press <Alt><F><P>, the Print window opens. Your default Windows printer is selected, but you can select any printer from the list of printers installed on your workstation.
 	
    In the Print window, click **OK** or press <Enter> to print the record.

Note: Connexion client uses Internet Explorer (IE) to print records and lists. Therefore, page margins for printing are determined by IE Page Setup settings. To adjust the margins, open the browser, and on the File

menu, click **Page Setup**. You can determine other print settings (for example, portrait or landscape orientation) in the client Print window.

Record limitations

- **Content of record.** OCLC Connexion does not limit the number of variable fields or total record length. Theoretically, records can contain up to 99,999 characters.
- **Number of records in files.** Online and local files can each store up to 9,999 records.

   Note: You can create multiple local files.

Display a record in the Find in a Library (WorldCat.org) view of a record

Display a bibliographic record currently open in the client in the Find in a Library® service at WorldCat.org.

The Find in a Library record view gives locations of WorldCat libraries that hold the work described, along with links that take you directly to library local systems. Or access cover art, information on alternative formats (large print, audiobooks, etc.), user reviews, and other evaluative content.

To display a Connexion client record in the Find in a Library view:

Action
Click **Tools > Find in a Library** or press <Alt><T><F>.   **Result:** Your default browser opens to the Find in a Library view of the record.

8. Record lists

Types of lists

Multiple records resulting from searching WorldCat, other OCLC databases, or online or local client files display in lists that show information based on the kind of records retrieved.

To open an item from a list, double-click the entry, or click to highlight an entry and press <Enter>.

The following table describes types of lists and information displayed:

List of ...	List type	Description
WorldCat lists		
WorldCat Search List By default, results are displayed according to the number of records retrieved Go to **Cataloging > Search > WorldCat** and click **Settings** to change the display	Group list 100 to 1,500 records	• Groups a large number of search results by type of material (books, computer files, etc.) and year of publication to make the results easier to manage • Each entry represents a group of 2 to 99 records **Note:** If a search retrieves more than 1,500 records, you receive an error message. Limit your search and try again
	Truncated list 6 to 100 records	• Each entry represents a record and gives a one-line description of the record. • Sort order and information extracted for display depend on the index you searched. **Note: Truncated lists can contain more than 100 records** if records retrieved are for a single year. If more than 100 records are retrieved, the system tells you the total number found and tells you how to view the next 100.
	Brief list 2 to 5 records	• Each entry represents a record and gives a short, 1- to 3-line description of the record • The list is sorted: — First by records with no main entry (1xx field), sorted by field 245 — Then alphabetically by field 1xx with secondary sort by field 245
Notes on WorldCat search results lists: • The title bar of a WorldCat search results list displays the search you entered by indexes searched. • The title bar of a WorldCat group list displays the total number of records retrieved in all groups. • Toggle between displaying a list as brief or truncated while you view the list (**View > List Type > Brief** [or **Truncated**]). • If a search retrieves only one record, the full record displays. • All windows showing WorldCat search results close when you do another WorldCat search.		

List of ...	List type	Description
WorldCat Browse List	Browse list	- Shows a list of titles that match or most closely match the phrase you entered - The item in the list that matches the search most closely is selected - Shows the number of matching records - Click an entry to open a record or, if multiple records match, to open a list of matching records The list that opens is determined by the option setting in Cataloging > Search > WorldCat, Settings button (**default:** As listed here, depending on the number of records retrieved). - To see more results than those displayed, use \<Page up> and \<Page down>.

List of ...	List type	Description
WorldCat Search List with GLIMIR selected **GLIMIR** = Global Library Manifestation Identifier that groups parallel bibliographic records (those that describe the same item using different languages of cataloging) **Note:** To display GLIMIR clusters, you must have the option selected to Display using GLIMIR clustering in the Search WorldCat window.	Truncated List 6 to 1,500 records retrieved	A GLIMIR truncated search results list has the same characteristics as a non-GLIMIR truncated list, except that: • Each entry represents the record in the cluster that has the most holdings. • You click an entry to see a list of all records in the cluster. • For each entry, the "Held" and "Holdings" columns that appear in "regular" truncated lists are replaced by the columns with cluster information: — Held in Cluster (the number of records in the cluster that represent items held by your library) — Holdings in Cluster (the total number of holdings for all records in the cluster) — Cluster Count (the total number of records in the cluster) **Note:** GLIMIR truncated lists are sorted the same way as non-GLIMIR truncated lists—by the data that corresponds to the index you searched. If you get a "regular" truncated list when you select an entry to show the records in a particular cluster, the records are sorted by main entry.
	Brief list 1 to 5 records retrieved	A GLIMIR brief search results list has the same characteristics as a non-GLIMIR brief list, except that: • Each entry is a GLIMIR cluster, represented by the record in the cluster that has the most holdings. • For each entry, the following additional information is included: — Held in Cluster (the number of records in the cluster that represent items held by your library) — Holdings in Cluster (the total number of holdings for all records in the cluster) — Cluster Count (the total number of records in the cluster) **Note:** In the unique situation where a search retrieves a single GLIMIR cluster containing only one record, the full record displays.
WorldCat Browse List with GLIMIR selected	Browse list	There is no difference in the browse results list itself. However, selecting an entry in a browse list results in a GLIMIR list (brief or truncated, as described above).

List of ...	List type	Description
Caution for using the GLIMIR option: When you select the option to show search results using GLIMIR clustering, only records that have GLIMIR data are retrieved. Any new records that you or other libraries are adding to WorldCat will not have GLIMIR data right away and so will not show in search results, even when you use very specific search criteria such as a known OCLC control number. Remember to check your GLIMIR option in the Search WorldCat window and turn it off if search results do not include records that you know should display.		
LC Authority File lists		
LC Authority File Search List	Brief list of up to 100 matches at a time	- Each entry in the list represents a record and gives a single-line description of the record. - Displays entries for 2 - 100 records. - If more than 100 records are retrieved, the system tells you the total number found and tells you how to view the next 100. - If you selected **Show See References** and/ or **Show See Also References** check boxes in the Search LC Names and Subjects window, the list shows all See and/or See Also references for each record in the results list. - The list is sorted in alphabetical order by main entry.
LC Names and Subjects History Search List	Brief list of up to 100 matches at a time	- Each entry in the list represents a record and gives a single-line description of the record. - Displays entries for 2 - 100 records. - If more than 100 records are retrieved, the system tells you the total number found and tells you how to view the next 100. **Note:** Access to authority history records is read-only. You cannot take actions from lists or displayed records. You can only copy and paste data or print displayed records.
Chinese Name Authority File Search List	Brief list of up to 100 matches at a time	- Each entry in the list represents a record and gives a single-line description of the record. - Displays entries for 2 - 100 records. - If more than 100 records are retrieved, the system tells you the total number found and tells you how to view the next 100. **Note:** Access to Chinese name authority records is read-only. You cannot take actions from lists or displayed records. You can only copy and paste data or print displayed records.

List of ...	List type	Description
WorldCat Search List with GLIMIR selected **GLIMIR** = Global Library Manifestation Identifier that groups parallel bibliographic records (those that describe the same item using different languages of cataloging) **Note:** To display GLIMIR clusters, you must have the option selected to Display using GLIMIR clustering in the Search WorldCat window.	Truncated List 6 to 1,500 records retrieved	A GLIMIR truncated search results list has the same characteristics as a non-GLIMIR truncated list, except that: • Each entry represents the record in the cluster that has the most holdings. • You click an entry to see a list of all records in the cluster. • For each entry, the "Held" and "Holdings" columns that appear in "regular" truncated lists are replaced by the columns with cluster information: — Held in Cluster (the number of records in the cluster that represent items held by your library) — Holdings in Cluster (the total number of holdings for all records in the cluster) — Cluster Count (the total number of records in the cluster) **Note:** GLIMIR truncated lists are sorted the same way as non-GLIMIR truncated lists—by the data that corresponds to the index you searched. If you get a "regular" truncated list when you select an entry to show the records in a particular cluster, the records are sorted by main entry.
	Brief list 1 to 5 records retrieved	A GLIMIR brief search results list has the same characteristics as a non-GLIMIR brief list, except that: • Each entry is a GLIMIR cluster, represented by the record in the cluster that has the most holdings. • For each entry, the following additional information is included: — Held in Cluster (the number of records in the cluster that represent items held by your library) — Holdings in Cluster (the total number of holdings for all records in the cluster) — Cluster Count (the total number of records in the cluster) **Note:** In the unique situation where a search retrieves a single GLIMIR cluster containing only one record, the full record displays.
WorldCat Browse List with GLIMIR selected	Browse list	There is no difference in the browse results list itself. However, selecting an entry in a browse list results in a GLIMIR list (brief or truncated, as described above).

List of ...	List type	Description

LC Authority File Root Browse List	Browse list	• Shows a list of 50 items that match or most closely match the browse term you entered.
		• The closest match is highlighted.
		• Shows the number of records represented by each browse term entry.
		• Double-click a term in the list (or click to highlight a term and press <Enter>) to open a record or a list of records, if multiple records match the term.
		• Under the closest match, shows an expanded list of subheadings that match or most closely match the expanded term you entered.
		— If more than 50 records match the browse term, the client displays the first set of 50.
		— **To see the next or previous set of 50 records:**
		    — Press <Page down> or <Page up>. (You may have to press more than once, depending on the size of your client window display.)
		    Or
		    — Scroll one entry at a time: Press the <Up arrow> or <Down arrow>. At the last or first entry of a set of 50, the display changes to the next or previous set, respectively.
		Note: The first set of 50 records is numbered 1 through 50. The next set displayed restarts numbering with 1. The client does not number the entire list consecutively, as it does other record lists.
		• Provides a text box at the top of the list to enter an expanded scan.
		See more about the data displayed in LC authority file browse lists in Authorities, Search Authority Files, and Use LC authority file search results.

LC Authority File Expanded Browse List (Opens only if you enter an expanded term in the Browse LC Authority File window or in the **Expaneded Term** box of the results list)	Browse list	• Shows a list of titles that match or most closely match the phrase you entered. • Shows the number of records for each heading entry. • Highlights the closest match. • Under the closest match, shows an expanded list of subheadings that match or most closely match the expanded term you entered.

List of ...	List type	Description
LC Names and Subjects History Browse List	Browse list	• Shows a list of headings that match or most closely match the term you entered • Shows the number of records for each heading • Highlights the closest match **Note:** Access to authority history records is read-only. You cannot take actions from lists or displayed records. You can only copy and paste data or print displayed records.
Online lists – save file, constant data, OCLC system news		
Online Bibliographic Save File Search List Online Bibliographic Constant Data Search List Online Authority Save File Search List Online Authority Constant Data Search List SystemNews Search List	Brief list of up to 100 matches at a time	• Each entry in the list represents a record and gives a single-line description of the record • Displays entries for 2 to 100 records • If more than 100 records are retrieved, the system tells you the total number found and tells you how to view the next 100 • Default sort order depends on the type of list: — Online bibliographic save file list: descending order by save file number (number the system assigns when you save a record) — Online bibliographic constant data list: alphabetical order by constant data name — LC authority file list: alphabetical order by main entry — Online authority save file list: alphabetical order by main entry — Online authority constant data list: alphabetical order by constant data name — System news list: by start date
Local lists (access while logged on or offline) – save files and constant data		
Local Bibliographic Save File Search List Local Bibliographic Constant Data Search List Local Authority Save File Search List Local Authority Constant Data Search List	Local file list	• Continuous list of all records in the local file (limit 9,999 records per file). • Default sort order depends on the type of list: — Local bibliographic save file: descending order by save file number (assigned when you save a record) — Local bibliographic constant data: alphabetical order by constant data name — Local authority file: alphabetical order by main entry — Local authority constant data: Alphabetical order by constant data name

Tip: One window of each of the types of lists in the table can remain open simultaneously. However, when you do a second search in the same file–for example, a second WorldCat search–the new search results list replaces the first list in the window (you would have to do the first search again to retrieve the original list). Keep multiple lists of the same type open by pinning (**View > Pinned**). See Cataloging, Edit Bibliographic Records or Authorities, Edit Authority Records for more information.

View a WorldCat search or browse list

The title bar of a list shows the source of the search results. Example: WorldCat Search List. For WorldCat search results, the title bar also shows the search you entered.

All lists for your current search remain open (browse, group, brief). Subsequent searches replace lists with new search results.

WorldCat search list. To view a WorldCat search results list that is longer than one screen:

Action
Press <Page up> or Page down> (moves to the previous or the next screen) Or Press <Up arrow> or <Down arrow> (moves up or down one entry at a time) Or Click, hold, and move the vertical scroll bar.

WorldCat browse list. Only 25 terms display at a time. To view terms preceding or following the initial display of 25:

Action
Press <Page up> or <Page down> (continues to move up or down beyond the initially displayed 25 entries ad infinitum each time you press the key) Or Press <Up arrow> or <Down arrow> (continues to move up or down one entry at a time ad infinitum each time you press the key) **Note:** You can use the vertical scroll bar only to move up and down in the currently displayed list of 25 entries.

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View a list of more than 100 records when only 100 display at a time

To view a list of more than 100 matches for an LC authority file or LC authority history search, an online bibliographic or authority save file search, an online bibliographic or authority constant data search, or a system news search:

Action
To view the next 100 records in the search results list, on the View menu, click **Navigate Records and Lists > Next 100 Records**, or press <Ctrl><Alt><Shift><V>, or press <Page down>. Or To view the previous 100 records, on the View menu, click **Navigate Records and Lists > Previous 100 Records**, or press <Ctrl><Alt><Shift><U>, or press <Page up>. **Tip:** Check the status bar to see where you are in the list of total records found. For any record selected on the list or opened for display, the status bar shows the record number of the total number of records found (for example 178 of 225).

See also Basics: Set Options and Customize, "Customize printing and display of records, lists, and labels" for instructions to change font size for printing and displaying a list.

Open records (or other lists) from a list

	Action
1	In a search results list, double-click an entry. Or Select an entry (click it or press <Up arrow> or <Down arrow> to highlight it), and then press <Enter>. Or Select multiple entries.
2	If a list opens, double-click an entry to open to open a record. To open the next record without returning to the list, on the View menu, click **Navigate Records and Lists > Forward**, or click 🔳, or press <F9>. To open the previous record on the list, on the View menu, click **Navigate Records and Lists > Forward**, or click 🔳, or press <Shift><F9>. **Note: Forward** and **Back** commands are not available for OCLC system news search results.

	Action
3	**For WorldCat group lists**, when you double-click an entry, another list opens (brief or truncated). To open the next entry on the group list without returning to the group list window, on the View menu, click **Navigate Records and Lists > Next Group**, or press <Alt><V><V><G>. Or To open the previous entry, click **Navigate Records and Lists > Previous Group**, or press <Alt><V><V><E>. **Note:** The title bar of a group list gives the total number of records matched in all group entries together.

Print a list

You can print an entire list or print selected entries in a list:

	Action
1	On the File menu, click **Print List**, or press <Shift><F12>. Or Select only entries you want to print (hold <Shift> and click to select adjacent records, or hold <Ctrl> and click to select non-adjacent records). On the File menu, click **Print List**, or press <Shift><F12>.
2	If you have more than one record selected, the Print List window opens. Click the button next to **All** to print all records in the list. Or Click the button next to **Selected Items** to print the list with only the entries you selected. Otherwise, go to step 3.
3	In the Print window, click **Print**, or press <Enter>. **Note:** If lists of online records from the LC authority file or bibliographic or authority save files or constant data files exceed 100 records, you can print only list entries in the currently displayed part of the list. You must display other sets in the list to continue printing more entries. (This limitation does not apply to local file lists.)

Note: Connexion client uses Internet Explorer (IE) to print records and lists. Therefore, page margins for printing are determined by IE Page Setup settings. To adjust the margins, open the browser, and on the File menu, click **Page Setup**. You can determine other print settings (for example, portrait or landscape orientation) in the client Print window.

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Print a record

	Action
1	Open a record, on the File menu, click **Print**, or click 🖨, or press <Ctrl><P>.
2	In the Print window, click **OK** or press >Enter>. Result: The client uses your default Windows printer to print the records in hard copy, unless you previously set the option in **Tools > Options > Printing** to print records to a file.

For local file lists only, you can print multiple records selected in a list without first having to open them:

	Action
1	In a list: Select adjacent records: Click to highlight the first entry, and then press and hold <Shift> and click the last entry. Or Select nonadjacent entries: Click to highlight the first entry, and then press <Ctrl> and click to highlight each additional entry.
2	On the File menu, click **Print**, or click 🖨, or press <Ctrl><P>.
3	In the Print window, click **OK** or press >Enter>. Result: The client uses your default Windows printer to print the records in hard copy, unless you previously set the option in **Tools > Options > Printing** to print records to a file.

Note: See Note in "Print a list" about adjusting page margins for printing.

For more information, see the section on "Records" above.

Select multiple records in a list

To select multiple records in a list:

Action
Select adjacent records: Click to highlight the first entry, and then press and hold <Shift> and click the last entry. The entire group of records between the entries is selected. Or Click an entry and hold the mouse button down while you drag the cursor up or down in the list to select the group of records you want. **Select nonadjacent entries:** Click to highlight the first entry. Then press <Ctrl> and click to highlight each additional entry.

Take actions on multiple records selected in a list

Actions you can take on records selected in a list depend on the source of the listed records (whether they are retrieved from WorldCat, the LC authority file, online or local save files, or online constant data files).

The following table summarizes the actions you can take on multiple records in each type of list:

Type of list	Actions available for selected records
WorldCat Search List (brief list)	• Save Record to Online File • Save Record to Local File
Online Bibliographic Save File List	• Submit for Review • Save Record to Online File • Save Record to Local File • Delete Record • Export • Set Status • Validate* • Apply Online Default Constant Data (or Apply by Name or Apply from List)** • Apply Local Default Constant Data (or Apply by Name or Apply from List)**
Local Bibliographic Save File List	When offline or online: • Print all or selected records from a list without first opening the records • Apply Local Default Constant Data (or Apply by Name or Apply from List)** • Delete Record • Copy Record • Move Record • Export • Set Status • Validate* When online only: • Save Record to Online File • Apply Online Default Constant Data (or Apply by Name or Apply from List)** When online, or if offline, marks for batch processing: • Update Holdings • Produce and Update Holdings • Alternate Produce and Update • Delete Holdings • Replace Record • Replace and Update Holdings
Online Bibliographic Constant Data List	• Save Record to Local File
LC Authority File Search List (brief list)	• Save Record to Online File • Save Record to Local File

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Type of list	Actions available for selected records
LC Names and Subjects History List	• Copy and paste data • Print records
Chinese Name Authority File Search List	• Copy and paste data • Print records
Local Authority Save File List **Note:** Actions are unavailable for records in an online authority save file list.	When offline or online: • Print all or selected records from a list without first opening the records • Apply Local Default Constant Data (or Apply by Name or Apply from List)** • Delete Record • Copy Record • Move Record • Export • Set Status When online only: • Save Record to Online File • Validate* • Apply Online Default Constant Data (or Apply by Name or Apply from List)** When online, or if offline, marks for batch processing: • Add to Authority File (NACO-affiliated libraries only) • Submit for Review • Replace Record (NACO-affiliated libraries only)
Online Authority Constant Data List	• Save Record to Local File
*The client displays validation results for all selected records in one list, showing the save file number and specific results for each record. **When you apply constant data to records selected in a list, and you have the fields-to-apply option set to apply the fixed field or to apply both fixed field and variable fields: If the constant data fixed-field data does not match that of the record, the client overwrites the record's fixed-field data automatically. You do not receive a warning or request for confirmation.	

Note: You cannot take final actions on records in lists of the following read-only records:

- Authority history records
- Chinese name authority records
- Records in a GLIMIR cluster list (records only represent a cluster; you must click an entry to display all records in a cluster to be able to take an action on any of the records)

Navigate among records and lists

When multiple records and lists are open, use commands on the View and Window menus to navigate among the open windows. The following is a list of possible navigation techniques:

- Use keystroke shortcuts to toggle between two open windows or cycle through all open windows (records and lists) in sequence:

  Press <Ctrl><Tab> or <Ctrl><F6>

- Cascade windows and cycle through to view them sequentially:

	Action

1	On the Window menu, click **Cascade**.
	Result:
	Open lists and records line up behind each other with their title bars visible.
	    • Record title bars show record source and title information from field 245 for bibliographic records or heading information from field 1xx for authority records.
	    • List title bars show the source of the search results.

2	Click a title bar to make a window the current window. Or Press <Ctrl><Tab> repeatedly to view each open list and record window.

- Tile windows vertically or horizontally to view simultaneously:

Action

On the Window menu, click **Tile Horizontally** to display open records in equally sized horizontal windows from top to bottom of the client work area.
Or
Click **Tile Vertically** to display records in equally sized vertical windows from side to side of the client work area.
 	
Results:
    • When you tile records, variable field text wraps. All content is visible (unless you select an option to truncate field data more than three to four lines long).
    • The client adds a horizontal scroll bar to the fixed field if necessary for viewing all elements.

- Minimize windows and arrange icons:

Action
Click _ in each window to minimize, and on the Window menu, click **Arrange Icons** or press <Alt><W><A>. The minimized window icons line up in a row.

- For WorldCat group lists: To open the next or previous group list entry (another list) without returning to the group list window:

Action
To open the next group entry (list), on the View menu, click **Next Group**, or press <Alt><V><G>. Or To open the previous group entry (list), on the View menu, click **Previous Group**, or press <Alt><V><E>.

Use right-click menu to customize lists

You may want to hide columns or change the order to show data that is most important to you without having to scroll horizontally, especially for a save file results list, which contains many columns:

	Action
1	Right-click anywhere in a list, and on the pop-up menu, click **List Settings**.
2	**To hide a column:** In the Column Settings window, select a column by its name and click **Hide**. Or Double-click a column to clear the check box next to its name. **To display a hidden column:** Select the column and click **Show**. Or Double-click to select the check box next to the column name. A check mark indicates that the column displays. **Note on default settings:** • In most types of lists, all columns are selected. • In WorldCat truncated lists, however, by default, **Holdings** (number of holdings) and **Control #** (OCLC number) columns are hidden.

3	**To change the order of columns:**
	Select each column you want to move, one by one, and click Move Up or Move Down until it is in the position you want.
	
	Or use the mouse to drag and drop columns in the order you need them:
	
	You can drag and drop columns using the mouse instead of using the right-click menu to change the order of columns:
	1. Place the cursor over the column heading of the column you want to move.
	2. Hold down <Ctrl>, left-click and drag the column heading.
	   Or
	   Right-click, hold and drag the column heading.
	
	   While you drag, the cursor becomes a rectangle.
	3. Drop the rectangle on top of the border between two columns where you want to place the column you are dragging.

4	To restore the default order of columns and re-display all columns, click **Reset**.
5	Click **OK** to make your changes and close the window. Or Click **Cancel** to close the window without making the changes.

Resize columns

Action
Move the cursor over the right-hand border of the heading for the column you want to resize until the cursor becomes ↔. Then click and hold while you drag the border to a new position. **Tip:** To hide a column, drag the right border all the way to the left border of the column.

Re-sort a list

Action
Click any column heading to sort the list by that column (see list of columns above). Or On the View menu, click **Sort by > [*item*]**. Various record characteristics are available, depending on the type of list. Possible sort categories include: • Author • Category • Constant Data Name • Date • Main Entry • Title **Note:** For lists of more than 100 records, sorting applies only to the 100 records currently displayed. If you display another set of 100 records, you must re-sort the list.

Keystroke shortcuts for working with lists

Press these keys ...	To do this ...
<Page down>	• Move the selection to first entry on the next page (applies to brief lists) • Move the selection to the next set of 100 entries on lists that display only 100 records at a time Search results lists that display 100 records are: — LC authority file search — LC authority file browse — Online bibliographic save file — Online bibliographic constant data — Online authority save file — Online authority constant data — OCLC news
<Page up>	• Move the selection to the first entry on the previous page (applies to brief lists) • Move the selection to the last entry of the previous set of 100 entries on lists that display only 100 records at a time

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Press these keys ...	To do this ...
<Down arrow>	• Move the selection to next entry • Move the selection to next entry in next set of 100 entries on lists that display only 100 records at a time: With the last list entry selected, press <Down arrow>
<Up arrow>	• Move the selection to previous entry • Move the selection to the previous entry in the previous set of 100 records on lists that display only 100 records at a time: With the first list entry selected, press <Up arrow>
<Shift><End>	Selects all entries in a list, beginning with the highlighted entry **Tip:** To select all entries in a list, click to select the first entry, and then press <Shift><End>.
<Shift><Down arrow>	Selects multiple adjacent records moving down the list from the selected entry
<Shift><Up arrow>	Selects multiple adjacent records moving up the list from the selected entry
<Home>	Selects the first entry of the displayed list
<End>	Selects the last entry of the displayed list
<Enter>	Opens the selected entry (opens a record or a brief list)
<Left arrow>	Scrolls to the left if there is a horizontal scroll bar in a list
<Right arrow>	Scrolls to the right if there is a horizontal scroll bar in a list