Basics: Set Options and Customize

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Revision History

Date	Section title	Description of changes
January 2008	1 Set client options	• In Tools > Options > Export > Record Characteristics: – You can export in more Dublin Core record standards than before (as well as exporting in MARC 21): – Dublin Core Qualified – Dublin Core Simple – OCLC Dublin Core Qualified – OCLC Dublin Core Simple – You can set an option to display a warning before exporting records that have parallel unlinked Latin script and non-Latin script fields • Added a description of the Tools > Options > Hand Press Book options page (anyone can activate the menu but only authorized Consortium of European Research Libraries (CERL) members can use the menu) • In File > Import > Record Characteristics, you can opt to import in two Dublin Core record standards (as well as importing in MARC 21): – Dublin Core Qualified – Dublin Core Simple
	8 Customize the spell checker	Removed instructions for importing spell checker settings from old CatME or Passport files.
May 2011	1 Set client options	• Maximum number of batch searches to download changed from 100 to 150 • New setting to allow exporting workforms • New option for export and import record format: MARC XML • Name “Hand Press Book” changed to “Heritage Printed Book” (HPB) • New options tab to set up and enable opening RDA Toolkit descriptions of variable fields
March 2012	1 Set client options	• New option to view WorldCat search results in GLIMIR clusters • New option to use RDA workforms for cataloging • Settings for new feature to automatically add a classification number to records via the prototype OCLC Classify Web service (**Edit > Classify**)
September 2012	All	Removed references to pathfinder.
April 2013	All	Removed references to Heritage Printed Book
June 2016	1 Set client options	Removed references to institution records

Contents

1. Set client options and customize – overview

Pre-set options versus required option settings

For the most part, after you install the Connexion client, you can log on to Connexion and start working immediately.

Some settings are required for specific features. You must select or enter certain settings before using some features of the client. For example, you must set a default logon authorization for batch processing; you must set an export destination before exporting records.

Default authorization/password

- **Optional** for logging on for online cataloging. The alternative to setting a default authorization is to enter an authorization/password each time you log on. To set a general-use default, go to **Tools > Options > Authorizations**.
- **Required** for logging on for batch processing. Either enter a default general-use authorization (go to **Tools > Options > Authorizations**) or enter an authorization for each local file you use for batch processing (go to **File > Local File Manager; click Authorization**).
- **Required** if you select a client action to start automatically when you open the client (**Tools > Options > General, Startup Options**) (can use general default or local file default authorization).

Export destination

- **Required** if you export records to your local system from the online system. To enter, go to **Tools > Options > Export**.

Holding library code, institution symbol, and (for NACO participants) MARC organization code

- **Required** for offline cataloging. To enter, go to **Tools > Options > General / Offline Cataloging** button.

Batch delete holdings

- **Required** settings in **Tools > Options > Batch** for successful batch delete holdings actions are:
- Select the **Delete attached LHRs when Deleting Holdings** check box (LHR = local holdings records)

RDA Cataloging

- Required settings in **Tools > Options > RDA Toolkit**:

  To view RDA field descriptions from displayed records, select the **Enable the RDA Toolkit** check box and enter your RDA Toolkit subscriber logon information (you must be a subscriber to use this feature).

  The client uses your information to log on to RDA Toolkit.

  See more information on the RDA Toolkit Web site at http://www.rdatoolkit.org.

- Select separate check boxes to use RDA workforms (instead of the default AACR2 workforms) to create new bibliographic and/or authority records and new bibliographic/authority constant data records.

  See Information and Resources in Preparation for RDA on the Library of Congress Web site for more details about RDA cataloging: http://www.loc.gov/aba/rda/

View WorldCat search results in GLIMIR clusters

- Required setting in Cataloging > Search > WorldCat.

  Select the Display using GLIMIR clustering check box.

  Note: Selecting this option does not affect batch searching. You cannot retrieve GLIMIR clusters with batch searches.

Print labels or export records via batch processing

- Required settings in **Tools > Options > Batch**.

  Under **Perform local actions in batch**, select or clear the following check boxes:
  ― **Bibliographic Record Export**
  ― **Label Printing**
  ― **Authority Record Export**

  When the check boxes are cleared, label printing and record export occur immediately, whether you are logged on or offline.

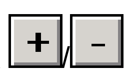
  When the check boxes are selected, records are marked for batch processing (local file records only).

What do you want to customize: quick locator for where to set options

In the following table, use the Go to column as a quick locator for the menu and command that opens the window for setting the option.

To customize ...	Go to ...
Actions on records: Disable Update and Produce for held records; warn before taking immediate online actions	Tools > Options > General
Accessions List printing	Tools > Options > Printing (click **Accessions List Options**)
Automatic stamp for spine labels	Tools > Options > Printing (click **Label Options**, and then click **Define Automatic Stamps**)
Auto-transliterate: Arabic or Persian WorldCat records	Tools > Options > International
Auto-transliterate: select fields to transliterate	Tools > Options > International (click **Choose Fields**)

To customize ...	Go to ...
Batch processing settings for searches, record actions and batch reports	Tools > Options > General
Classification number for a record	Tools > Options > Classify
Classification scheme for offline cataloging	Tools > Options > General (click **Offline Cataloging Options**)
Derive record: fields to transfer (Options for bibliographic and constant data records)	Tools > Options > Derive Record Fields
Export destination	Tools > Options > Export
Export: Enable export of workforms	Tools > Options > Export
Export: select fields to delete	Tools > Options > Export (click **Field Export Options**)
Export: select record standard and character set	Tools > Options > Export (click **Record Characteristics**)
Export: select an option to display a temporary report for immediate export	Tools > Options > Export
Export: select an option to get a warning before exporting records with unlinked non-Latin script fields	Tools > Options > Export
Extract metadata to create records from electronic files	Cataloging > Create > Extract Metadata (click **Settings** or **Advanced Settings**)
Fixed field display: drop-down lists	Tools > Options > Record Display
Fixed field display: position in record	View > OCLC Fixed Field > Top [or Bottom or Display as Variable Field]
Font type, size, and style for labels	Tools > Options > Fonts
Font type and size for records, lists, and text boxes in search windows	Tools > Options > Fonts
GLIMIR results for WorldCat searching	Cataloging > Search > WorldCat
Holding library code, institution symbol, and MARC organization code (NACO) for offline cataloging	Tools > Options > General (click **Offline Cataloging Options**)
Import: select character set and record standard	File > Import (click **Record Characteristics**)
International cataloging: using non-Latin scripts	Tools > Options > International
Keystroke shortcuts and keymap files	Tools > Keymaps
Label printer	Tools > Options > Printing
Label printing options: format, print offsets, etc.	Tools > Options > Printing (click **Label Options**)
Labels: print in boldface type	Tools > Options > Fonts
Language for Connexion client interface	Tools > Options > International
Local files	File > Local File Manager
Logoff: inactivity timer and warning	Tools > Options > General (click **Session Timer Options**)
Logon connection to OCLC system	Tools > Options > Access
Logon authorization for a local file	File > Local File Manager (select a local file and click **Authorization**)
Logon procedures: authorizations	Tools >Options > Authorizations
Macros	Tools > Macros > Manage
My Status: set default	Tools > Options > My Status
RDA Toolkit: Setup	Tools > Options > RDA

To customize ...	Go to ...
RDA workforms for creating bibliographic or authority records or bibliographic or authority constant data	Tools > Options > RDA
Record display colors for: background, cells, text, and invalid or converted characters	Tools > Options > Record Display
Record display: variable fields	Tools > Options > Record Display
Record printing: to text file	Tools > Options > Printing
Right-click menu for editing records Right-click menu for customizing lists	Right-click in a record Right-click in a list
Spell checker	Tools > Options > Spelling
Startup macro or command	Tools > Options > General (click **Startup Options**)
Status bar: show or hide	View > Status Bar
Text strings	Tools > Text Strings Or View > Toolbars > Quick Tools
Toolbar (mini): Add or remove buttons	Tools > Toolbar Editor
Toolbar: Show on one line or two	Command on drop-down list at end of toolbar
Toolbar (main): Button size	Tools > Options > Toolbar
Toolbars: Show or hide	View > Toolbars > Client View > Toolbars > WorldCat Quick Search View > Toolbars > Quick Tools
User tools	Tools > User Tools Or View > Toolbars > Quick Tools
User profiles	Tools > Profiles
Validation level for holdings and export	Tools > Options > General (click **Validation Level Options**)
Variable field data display	Tools > Options > Record Display
WorldCat Quick Search (show or hide on toolbar)	View > Toolbars > WorldCat Quick Search
WorldCat search results display	Cataloging > Search > WorldCat (click **Settings**) And View > List Type > Brief [or Truncated]
WorldCat search and browse index lists and search material type and language lists: Customize	Cataloging > Search > WorldCat And Cataloging > Browse WorldCat Click  to expand to the full list or reduce to a short list, respectively. Click  to add, delete, or move indexes in the short list.
Z39.50 connection to retrieve local system records	Tools > Options > Z39.50

Checklist and description of options in Tools > Options

Option tab name	Settings available
Access	• View, change, or optimize the access method you use to connect to the OCLC Connexion cataloging system. **Default (suitable for most users):** OCLC Default (URL: http://connexion.oclc.org) • Click to select or clear an option for a persistent connection if you use a proxy server to connect to the OCLC system, and you have problems logging on (keeps the same TCP connection active through multiple requests). **Default:** Option cleared **How?** See the first three sections of Getting Started/"Set up communications and log on." • Click to select or clear an option to enable statistics logging or transaction logging (assists OCLC staff to evaluate system performance if needed). **Default:** Statistics logging selected; transaction logging cleared. **Recommendation:** Keep these settings unless advised by Connexion support when you troubleshoot problems. **More information?** See Set Up Communications and Log On, "Set up communications and log on: System responses for troubleshooting."
Authorizations	The authorization selections you make customize the way you log on to the system (**File > Log On**). You can: • Set up automatic logon by saving your authorization and password and selecting it as the default • Set up to 10 authorization/password combinations from which to select for logging on to Connexion • Name each authorization/password combination to help distinguish them • Choose not to supply a default password to prevent unauthorized logon **Default:** No default authorization or password is provided. The first authorization/password entry is selected as the default. It is blank until you enter an authorization and/or password. **How?** See "Set up communications and log on" in Getting Started. **Note: An option for local files:** In **File > Local File Manager,** you can enter an authorization and password for a local file for interactive logon and batch processing. If you do not enter one, the client simply uses the authorization/password you establish in **Tools > Options > Authorizations** for interactive logon and batch processing for the local file.

Option tab name	Settings available
Batch	Batch settings customize the way the client processes searches and/or record actions in batch mode. Select options for: • Batch searching: — Set the maximum number of matches to download. **Default:** 1 record **Maximum:** 150 records — Retain search keys for searches that resulted in errors/records not found and/or too many matches. **Default:** No search keys are retained • Batch actions on records: — Delete attached local holdings records (LHRs) when you delete holdings (**required** for batch deleting holdings; does not affect taking Delete Holdings actions while logged on). — Select batch mode for printing labels and exporting bibliographic and/or authority records in local files. Otherwise, printing labels and exporting take place immediately, whether you are online or offline. All other actions occur immediately when you are online or are marked for batch processing when you are offline. **Default:** All check boxes cleared; label printing and exports occur immediately whether logged on or offline. • Batch reports: — Display batch reports immediately after the batch runs — Print batch reports immediately after the batch runs **Default:** Batch reports display, but do not print, afrer the batch runs How? See Cataloging, Take Actions on Bibliographic Records, “Run batch processing.”
Classify	Set options for using the prototype OCLC Classify Web service to get a recommended classification number for a displayed bibliographic record (**Edit > Classify**): • Select one of the following classification schemes: — **Dewey** Or — **Library of Congress** (**default**) • Enter a tag in the **Create the following variable field from Classify result** box for the field where you want to insert the classification number. (**Default:** 090)
Derive Record	• Select fields to transfer when you derive a new bibliographic record or a new bibliographic constant data (**Edit > Derive > New Record** or **New Constant Data**) Or Reset to the **default:** 1XX through 8XX (X = any number) **How?** See Cataloging: Create Bibliographic Records, “Create a bibliographic record from an existing record.”

Option tab name	Settings available
Export	**Destination:** • Create at least one of the following export destinations: – File – LPT Port – Connection (serial, network, or TCP/IP communications connection) – OCLC Gateway Export (displays messages from your local system) • Select a destination or, if you export to different files, select **Prompt for filename** • Edit or delete an export destination **Record Characteristics:** • Select a record standard for exporting bibliographic records: – MARC 21 (default) – Dublin Core Qualified – Dublin Core Simple – OCLC Dublin Core Qualified – OCLC Dublin Core Simple – MARC XML **Notes:** – Dublin Core standards are structured in XML. – If you select the Dublin Core or MARC XML standard, the client allows only the UTF-8 Unicode character set. – The only record standard available for authority records is MARC 21. • Select a character set for exporting bibliographic and authority records separately: – MARC-8 **(default)** – UTF-8 Unicode • Reset to default selections **Remove fields:** • Click **Field Export Options** to specify fields you want removed from exported records **Enable export of workforms:** • Click the **Allow export of workforms** check box to enable the **Action > Export** command for a displayed workform or multiple records that include workforms selected in a list. The option applies to all online and local save file types (bibliographic and authority). Workforms are new records that have not been added to WorldCat and therefore do not have OCLC control numbers. **Print report showing results of immediate export** • Click the **Display Report for Immediate Export Results** check box to display a temporary report after immediate export. The report shows fatal errors and fields not mapped when records export in Dublin Core. **Default:** Report does not print.

Option tab name	Settings available
Export (cont.)	**Display a warning before exporting records that have unlinked non-Latin script fields** • Click the **Warn before exporting bibliographic records that include unlinked non-Latin script fields** check box. Displays a warning before exporting records with unlinked non-Latin script fields. Select if your local system cannot display unlinked non-Latin script data. You can continue or cancel exporting or— for records selected in a list or marked for batch export—skip the record and continue exporting. **How?** See “Export bibliographic records” or “Export authority records.”
Fonts	• Select a font for displaying and printing records and lists **Default:** Arial Unicode MS (or, if not installed, uses system default font) **Caution:** Arial Unicode MS is a Unicode-compliant font. If you change fonts, you must specify a Unicode- compliant font to display and add diacritics and special characters. • Select a font size for displaying records and a font size for printing records **Default:** 9 pt, display and print • Select a font size for displaying lists and a font size for printing lists **Default:** 9 pt, display and print **Notes:** — The font size you select for displaying records also sets the font size for text you enter in client search windows. — A change to this setting does not take effect until the next time you display a record. • Select font type, size, and style (boldface or regular) for printing labels **Default:** ALA BT Courier; 12 pt; regular. The font is supplied when you install the client. **How?** See “Customize printing and display of records, lists, and labels” and “Select a font type and size for printing labels”
General	**Session timer options** The client automatically logs off your online session after 39 minutes if you have not interacted with the system. To customize automatic logoff, you can: • Specify number of minutes of inactivity before logoff **Default:** 39 min. **Range:** 5 to 39 min. • Hide or display warning message before automatic logoff **Default:** Selected; the warning message displays • Specify number of minutes before logoff when the warning appears. **Default:** 5 min. **Range:** 1 to 9 min. **Caution:** Do not set timer and warning to the same number of minutes. **How?** See Basics, Set Up Communications and Log On, “Customize automatic logoff timer and warning”

Option tab name	Settings available
General (cont.)	**Action options** • Select or clear the check box to **Disable Update and Produce if bibliographic record is held**. If your library owns the item represented by a displayed record, you cannot: Update Holdings, Produce and Update Holdings, Alternate Produce and Update Holdings, or Replace and Update Holdings • Select or clear option to receive a warning before the client processes an immediate action. **How?** See "Take actions on bibliographic records" **Startup options** • Select a macro to run automatically at startup. Or • Select a client function to run at startup (for example, **Logon + Search WorldCat** or **Launch WebDewey**) **How?** See "Set up communications and log on" **Offline cataloging options** • Specify classification scheme for local bibliographic save file to use for labels and to supply a blank call number field when you catalog offline. Select one of the following: Library of Congress Dewey (**default**) National Library of Medicine Canadian Government National Agricultural Library • Enter holding library code and institution symbol for a local file to be used for workforms, constant data workforms, and imported records when you catalog offline • Enter MARC organization code if you are an authorized NACO participant. **How?** See "Manage local files for offline/online cataloging" **Validation level options** • Set the validation level for automatic system validation for bibliographic WorldCat records. Set to: — **Structure (default)**, **Basic**, or **Full** for completing these actions: — Update Holdings — Produce and Update Holdings — Alternate Produce and Update — Update Holdings as part of the Replace and Update Holdings action — **None (default)**, **Basic**, or **Full** for completing Export **How?** See "Validate records online or offline."

Option tab name	Settings available
International	**Export** For exported records with non-Latin scripts, determine whether Latin script only, other scripts only, or all data appear in the records. If "all," determine which data appears in corresponding 880 fields. **Default:** All data exports with non-Latin script data in 880 fields) **Interface language** Select a language: • Chinese (Simplified) • Chinese (Traditional) • English (default) • German • Japanese • Korean • Spanish **How?** See "Connexion client international cataloging" **Other** • Sort search results alphabetically by Latin script or in Unicode order by non-Latin scripts • Include paired fields in workforms for creating non-Latin script records. **How?** See "Use non-Latin scripts for cataloging." **Auto-transliterate** • Auto-transliterate romanized fields into Arabic script fields in Arabic and/or Persian records retrieved from WorldCat interactively (not by batch). Translliterates records with language code *ara* or *per* and no field 066. **Default:** Check box cleared • Select or clear fields that are automatically transliterated into Arabic script. **Default:** Fields 1xx, 2xx, 3xx, 4xx, 5xx, 6xx, 7xx, 8xx selected **How?** See "Arabic cataloging."
My Status	My Status is a free-text status (maximum of 40- characters) you can assign to help you sort and find specific records. You can assign a My Status to individual records or records selected in a list, or you can set a single default My Status to apply automatically for the following records: • **Bibliographic:** All online or local bibliographic save file records • **Bibliographic Constant Data:** All online or local bibliographic constant data records • **Authority:** All local authority save file records • **Authority Constant Data:** All local authority constant data records (Unavailable for online authority save file records and online authority constant data records.) **Default:** None **How?** See "Save bibliographic records" or "Save authority records"

Option tab name	Settings available
Printing	**Labels:** • Select a default printer for printing labels **Default:** Your default printer in Windows **Note:** For printing records and lists, the client always uses your default printer in Windows, unless you temporarily change to another printer in the Windows Print window • Open a window to select the following options: — Format (SL4, SL6, SLB, or SP1) **Default:** SL4 — Print offsets **Default:** None — Type of label stock (continuous or sheet) **Default:** Continuous — MARC tag containing content you want to print on pocket labels. — Print to a specified text file instead of a printer — Default automatic stamp on spine labels or stamp for a specific holding library code. — Print a sample label to check the placement of text — For sheet label stock only, prompt to start printing at a specific column and row **Default:** Not selected **Records:** • Print to a specified text file instead of a printer. **Accessions Lists:** Open a window to select: • Print to a specified HTML file instead of a printer. • Define a MARC tag containing content you want to print at the end of each accessions list entry. **How?** See "Customize printing and display of records, lists, labels, and accessions lists"
RDA	**RDA workforms** Set options to use workforms based on RDA (instead of the default workforms based on AACR2) to create records: • For bibliographic records and/or bibliographic constant data: Click to select (or clear) the **Use RDA workforms when creating new bibliographic records** check box. • For authority records and/or authority constant data: Click to select (or clear) the **Use RDA workforms when creating new authority records** check box.

Option tab name	Settings available
RDA (cont.)	**RDA Toolkit field Help** Enable automatic links to RDA Toolkit field descriptions for individual variable fields in bibliographic or authority records, workforms, or constant data: • Select the **Enable the RDA Toolkit** check box to enable opening an RDA Toolkit description of a variable field where the cursor is located. **Note:** You must be a subscriber to use this feature. • Depending on how your access is set up in your RDA Toolkit subscription: – Select the check box for the option **Use IP authentication for logon**. Or – Enter your subscriber user name and password in the text boxes. • The client uses your information to log on to RDA Toolkit when you display a field description. Once the field Help option is set, to display an RDA Toolkit field description: • With the cursor in a variable field, click **Tools > RDA Toolkit**. **Notes:** • RDA = Resource Description and Access. • If you are interested in subscribing to RDA Toolkit, see details on the RDA Toolkit Subscribe Web page at: **http://www.rdatoolkit.org/subscribe** • See general information about RDA Toolkit at: **http://www.rdatoolkit.org**. • For more about RDA cataloging, see the Information and Resources in Preparation for RDA page on the Library of Congress Web site at: **http://www.loc.gov/aba/rda/**
Record Display	**Colors** • Select colors for displaying records for displaying bibliographic and authority records **Default:** Background gray, text black, cell background white • Select a color to display invalid MARC-8 characters (**Edit > MARC-8 Characters > Verify**) **Default:** Red • Select a color to display automatically converted CJK characters (**Edit > MARC-8 Characters > Convert to MARC-8 CJK**) **Default:** Green • Reset colors to default **Fields** • View all data in record fields (cells expand as you add data) Or Truncate fields and add a scroll bar when cells become longer than 3 or 4 lines **Default:** Checked. Record fields show all data • Use or hide drop-down lists of fixed field element values. (Select a value from a list or type over the value, whether or not the value you enter is on the list.) **Default:** Fixed field drop-down lists are available **How?** See “Customize printing and display of records, lists, and labels”

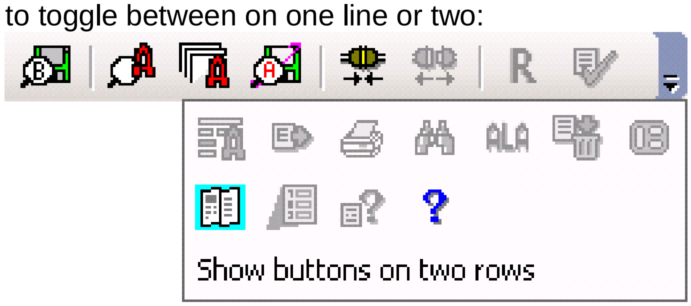
Option tab name	Settings available
Spelling	• Open a window to set general options (types of words to skip, for example, words with all letters capitalized, etc.) **Default:** The spell checker ignores domain names, such as www.oclc.org. • Open a window to customize which fields the spell checker checks and which subfields, if any, to skip. (The client supplies a default list of fields and subfields.) • Select or clear an option to skip name information only in field 505. **Default:** Check box cleared; all 505 data is checked for spelling. • Open a window to edit the spell checker dictionary; add, edit, or delete words you want the spell checker to skip (accept as correct). (By default, the client supplies a list of words and letters.) • Select the language of the main dictionary. **Default:** English (United States) **How?** See "Customize the spell checker"
Toolbar	• Select Toolbar Button Size: Standard or large **Default:** Standard **How?** See "Customize the toolbar"
Z39.50	Enter Z39.50 configuration settings to connect to your local system, retrieve a bibliographic record, and import it as a workform into the client. **How?** See Retrieve local system records using a Z39.50 connection

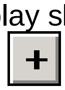
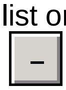
Checklist and descriptions of additional options

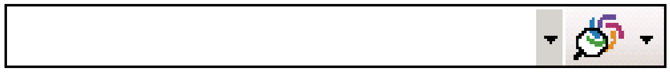
Customization	Options available
Extract metadata from electronic files (Cataloging > Create > Extract Metadata)	Select options for records created by automatically extracting metadata from electronic files (Web page *.htm or *.html file, Word *.doc file, Adobe Portable Document *.pdf file, or MP3 audio file *.mp3): • For a Web file, also create multiple records from files linked from the Web page you specify • Settings: — Display or save created records to the online or local save file — Create Dewey numbers — Apply default constant data — Define a My Status • Advanced settings: — For Web files only: Skip or follow redirected URLs — Determine the wait time for metadata extraction to be completed
Fixed field display (View > OCLC Fixed Field)	Display fixed-length fields at the top or bottom of records or display as variable fields LDR, 001, 005, and 008. **How?** See "Customize printing and display of records, lists, and labels."

Customization	Options available
Import records - select a record standard and character set (File > Import; click Record Characteristics)	Select record characteristics for imported records: • For bibliographic records only, select a record standard: — MARC 21 (**default**) — Dublin Core Qualified — Dublin Core Simple — MARC XML **Notes:** — Dublin Core standards are structured in XML. — If you select Dublin Core or MARC XML, the client automatically selects the UTF-8 Unicode character set. — The only record standard available for authority records is MARC 21. • Select a character set for imported bibliographic and authority records separately: — MARC-8 (**default**) — UTF-8 Unicode • Reset to default selections **How?** Import bibliographic records (same procedure applies to authority records)
Keystroke shortcuts (Tools > Keymaps)	A keymaps is a file of optional keystroke shortcuts for using menu commands, entering diacritics and special characters, inserting text strings, or running macros. The client supplies default keystrokes for commands and characters. Options for keystroke shortcuts include the following: • View all keystroke assignments in any keymap file • Select a default customized keymap file (if you create additional files) **Default: Custom.Keymap.xml** • Assign or unassign any keystroke assignment • Disable the default client keystroke assignments • Reset assignments to the default • Open a Keymap Organizer to organize keystroke assignments and files • In any keymap file, view only keystrokes you assigned **Default:** The client installs with default keyboard shortcuts. To view all assigned keystrokes, go to **View > Assigned Keys** **How?** See “Customize keystroke shortcuts for menu items, macros, or characters”
Local files (File > Local File Manager)	The client provides local bibliographic and authority save files and local bibliographic and authority local constant data files **Authorization/password for local file:** • Assign an authorization and password to use for interactive logon and batch processing when you use that particular local file. **Default:** None. The client uses the authorization/ password you set up in T**ools > Options > Authorizations** **How?** See “Assign a separate authorization/password to a local file (optional)”

Customization	Options available
Local files (File > Local File Manager) (cont.)	**Customize locations for local files:** • The default location for Connexion client local files is *X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Db*, where X is the letter of your hard drive. • The client creates default local files (with no data) in this location when you install the software. • You can add other locations for local files, create multiple files, and change the default any time. **How?** See Add locations and/or create local files **Automatic backup option for local files:** Select one of these options: • Do not back up local files • Back up to same folder as original file (**default**) The client names the automatic backup file the same name but with the added file extension ***.bac** • Back up local files to a different folder you specify **How?** See “Back up files automatically.” **Compact/repair local files** • Remove empty space from a local file after you delete or move records from the file to keep file size manageable • Repair a file when you receive erroneous messages that records in a local file are in use by another (unlocks "stuck" records) • Update local file indexes for records saved before changes made to the indexes **How?** See “Manage local files for offline/online cataloging.”
Macros (Tools > Macros)	• Write or edit macros (short computer programs) to automate routine tasks • Record macros automatically • Run, pause, or stop macros • Manage macro books (folders) to store macros **How?** See “Use client macros” and “List of Connexion client macro commands”
Status bar, show or hide (View > Status Bar)	Show or hide the status bar **How?** See Use Client Interface, “Main window”

Customization	Options available
Text strings (Tools > Text Strings)	Create text strings for often used data to insert in records (supplements constant data) • Create, edit, or delete text strings • Click **Apply** to insert a selected text string into the displayed record at the cursor location. **Alternatives:** — Use the text string quick tool on the toolbar.  Click the arrow and in the drop-down list, click Manager. — Assign a text string to a keystroke shortcut or to a user tool. **Default:** No text strings until you create one or more **How?** See "Create custom text strings"
Toolbar, main client (Tools > Toolbar Editor)	• Add or remove buttons to customize the toolbar **Default:** The client installs with preselected toolbar buttons (see Basics, Use the Client Interface, "Toolbars") • Reset the toolbar to the original default selection and order of buttons. **How?** See "Customize the toolbar"
Toolbar (main) - display on one line or two	Display the toolbar on one or two rows. Select **Show buttons on two rows** or **Show buttons on one row** in the toolbar drop-down list at the end of the toolbar to toggle between on one line or two:  **How?** See "Toolbars"
Toolbars, show or hide (View > Toolbars > Client Or View > Toolbars > WorldCat Quick Search Or View > Toolbars > Quick Tools)	Show or hide the main client toolbar, the WorldCat quick search toolbar, or text string or user tool quick tools **Default:** The client displays all toolbars **Tips:** • Use drag and drop to reposition these toolbars to the right, left, top, or bottom of the client window. • Use <Alt> with drag and drop to change the position of a button on the main client toolbar. **How?** Show or hide toolbars See Basics, Use the Client Interface, "Toolbars."

Customization	Options available
User Profiles (Tools > Profiles	• Create, select, or delete user profiles • Use to switch between different sets of options and customizations (useful for cataloging for different libraries that require different settings) **Default:** The client provides a single set of default settings stored in: **X:\Documents and Settings\[user name]\ Application Data\OCLC\Connex\Profiles\ MyProfile**, where **X** is the letter of your hard drive **How?** See “Create multiple user profiles for options and customizations”
User Tools (Tools > User Tools > Assign)	• Assign, unassign, view, or print up to ten generic User Tools. When assigned, use the command on the Tools menu or add the toolbar button to the toolbar. Or Avoid the menu/command and use the user tools quick tool on the toolbar. In the drop-down list, click **Manage**.  Assign tools to: — Enter a diacritic or special character — Run a macro — Issue a menu command — Insert a text string • Customize default user tool descriptions that appear as tool tips and **Tools > User Tool** menu names **Default:** User tools are unassigned **How?** See “Assign custom user tools”
WorldCat GLIMIR search results (Cataloging > Search > WorldCat)	Set an option to apply GLIMIR clustering to search results: • In the Search WorldCat window, click the **Display using GLIMIR clustering** check box.
WorldCat indexes (Cataloging > Search > WorldCat Or Cataloging > Browse > WorldCat)	• For a guided search, choose from a short list (most used) or a comprehensive list of: — Indexes — Languages — Material types • For a guided browse (index scan), choose from a short list or comprehensive list of indexes • Display short list or comprehensive list: Use  and  buttons • For short lists (except languages), customize the list by adding, removing, or reorganizing indexes: Use  button **How?** See Cataloging, Search WorldCat, “Customize WorldCat search and browse interfaces”

Customization	Options available
WorldCat quick search toolbar (View > Toolbars > WorldCat Quick Search)	Enter a WorldCat search or browse (index scan) in command line format directly in the toolbar without having to open the WorldCat Search window.  **How?** See procedure in Use WorldCat quick search for command line searching
WorldCat search results (Cataloging > Search > WorldCat; click Settings)	Set an option to determine the way WorldCat search results display: • Always display as a brief list • Always display as a truncated list • Always display a full record (if multiple records are retrieved, displays first record in the list). **Note:** You can also toggle between list brief and truncated display using **View > List Type > Brief** [or **Truncated**]). **How?** See Cataloging, Search WorldCat, “Customize WorldCat search and browse interfaces”

Stored option settings and customizations

When you set or change options and other customizations, the client stores them in a file called **Options.xml** and applies them each time you open the program. The client also keeps your options settings when you update the program.

For more about backing up or sharing user data files such as **Options.xml**, see “User data files (back up or share) and program files” in Getting Started with OCLC Connexion Client.

2. Customize printing and display records, lists, and labels

General notes

- **Settings retained.** The client keeps any settings you change each time you open or update the program, unless you change the settings again.
- **Controlling how records and lists print.** The page margins for printed records and lists are determined by Page Setup settings for your Internet Explorer. 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.

Records and lists

- **Select colors for displaying records**
  – Change colors for record display to help visually distinguish bibliographic records from authority records.
  – Change the color to display invalid MARC-8 characters if you use Edit > MARC-8 Characters > Verify.
  – Change the color to display automatically converted MARC-8 CJK characters if you use Edit > MARC-8 Characters > Convert to MARC-8 CJK.

	Action
1	On the Tools menu, click **Options**, or press <Alt><T><O>.
2	Click the **Record Display** tab.
3	In the **Element** list under **Colors**, click one of the following record elements: • Bibliographic Field (cell background) **Default:** White • Authority Field (cell background) **Default:** White • Bibliographic Window (background) **Default:** Gray • Authority Window (background) **Default:** Gray • Bibliographic Text **Default:** Black • Authority Text **Default:** Black • Invalid MARC-8 characters **Default:** Red • Converted MARC-8 CJK characters **Default:** Green **Tip:** You can make records appear more like continuous text by eliminating cell borders: Select the same color for field and window background.
4	Click **Define**.
5	Use the standard Windows **Color** window to define a color.
6	Click **OK**.

	Action
7	Follow steps 3-6 to select colors for other record elements.
8	When finished, click **Close**, or press <Enter> to apply the settings and close the Options window. Or Click **Apply** to apply the settings without closing the window.
9	Optional. To undo your settings any time, click **Reset** to return all color selections to the original (default) settings.

- **Select display of fields with lengthy data**
  By default, the client expands variable field cells as needed to show all data. You have the option to truncate data in lengthier fields to three or four lines and view it using a vertical scroll bar

Action
On the **Record Display** tab (**Tools > Options**), click the **View All Field Data** check box to select or clear the option. **Results:** • A check mark indicates that the option is selected • When the option is selected, fields expand as needed to display all data • When the option is cleared, fields are truncated if they are longer than three or four lines. The client adds a vertical scroll bar to view all data in the field **Default:** Check box selected. Fields expand as needed to display all data.

- **Select display of fixed fields in records**
  Options for the fixed field display include:
  – Change position of fixed field to the top (default) or bottom of the record or display as variable field.
  – Show or hide drop-down lists of fixed field element values (by default the lists display).
  – See “Edit bibliographic records” or “Edit authority records” for details.

- **Select a font type and size(s) to display and print records and lists**
  For better readability or to save space on pages of printouts, you can change font size or type:

	Action
1	On the Tools menu, click **Options**, or press <Alt><T><O>.
2	Click the **Fonts** tab.
3	Select a font type for printing records and lists: In the **Font** list, under **Records and Lists**, click the name of a font. The list shows all fonts installed on your workstation. **Default:** Arial Unicode MS (if installed on your workstation; system default font, if not) **Caution:** Arial Unicode MS is a Unicode-compliant font. If you change fonts, you must specify a Unicode-compliant font to display diacritics and special characters.

	Action
4	Select a font size for displaying: • **Records** In the **Display Font Size** list under **Records and Lists/Records**, click a font size, or highlight the size shown and type a font size. **Default:** 9 pt **Notes:** – When you change the font size for displaying records, the change does not take effect until the next time you display a record. – The font size you select also determines the font size of text you enter in client search windows. – For display of Bengali script records in Windows XP, you need to increase the font size for viewing and editing the Bengali script data. • **Lists** In the **Display Font Size** list under **Records and Lists/Lists**, click a font size, or highlight the size shown and type a font size. **Default:** 9 pt
5	Select a font size for printing: • **Records** In the **Print Font Size** list under **Records**, click a font size, or highlight the size shown and type a font size. **Default:** 9 pt • **Lists** In the **Display Font Size** list under **Lists**, click a font size, or highlight the size shown and type a font size. **Default:** 9 pt
6	When finished selecting a font and font size(s), click **Close** or press <Enter> to apply the settings and close the Options window. Or Click **Apply** to apply the settings without closing the window. Or Click **Cancel** to cancel changes.

Tip: For printing records and lists, the client uses your default printer in Windows. You can set a different printer for printing labels only (see next section). To switch to a different printer any time:

Each time you print, in the Print window under **Select Printer**, select another printer.
Or
Change your default printer in Windows (go to **Windows Start > Settings > Printers**, double-click the printer you want, and on the Printer menu, click **Set as Default**.

- **Print records to a text file**

	Action
1	To print records to a text file, you must first select an option: On the **Printing** tab (**Tools > Options**), under **Records**, select the **Output to Text File** check box. In the adjacent text box, type the full path and file name of a text file. Or Accept the default file: **X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Db** Or Click **Browse** and navigate to another text file. Then click **Open**. **Default setting:** Check box cleared. Records print to your default printer in Windows, not to a text file **Results:** With the print-to-file option selected: • The first time you print records, if the file doesn't exist, the client creates it and prints the records to it. If the file already exists, the client asks if you want to overwrite the existing records, append to the existing records, or cancel printing. • The client continues to print records to the file until you clear the check box. • Text files support the ALA character set used in the client to enter diacritics and special characters.
2	When finished, click **Close** or press <Enter> to apply the setting and close the Options window. Or Click **Apply** to apply the setting without closing the window. Or Click **Cancel** to cancel changes and close the Options window.

Labels

Note: The client keeps your settings unless you change them again.

- **Select a printer for labels**

	Action
1	On the **Printing** tab (**Tools > Options**), under **Labels**, select a printer in the **Label Printer** list. The list includes all printers installed on your workstation. **Default:** Your default printer in Windows **Tip:** Dedicating a printer for printing labels saves time. You can keep it filled with label stock. You need not switch from paper to label stock each time you print labels
2	When finished, click **Close** or press <Enter> to apply the settings and close the Options window. Or Click **Apply** to apply the settings without closing the window.

Alternative: See “Print labels to a text file” below.

- **Select options for printing labels**
  Changing or selecting the following settings is optional:

	Action
1	On the **Printing** tab (**Tools > Options**), under **Labels**, click **Label Options**.
2	In the Label Printing Options window, under **Format**, select a label format: • SL4 - spine label and two four-line pocket labels. Label set produced: — 1 spine label: up to 9 lines of 8 characters each for call number and input stamps 2 card/pocket labels: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title and any additional tag specified for holding library code: 2 lines No blank lines • SL6 - spine label and two six-line pocket labels. Label set produced: — 1 spine label: up to 15 lines of 8 characters each for call number and input stamps 2 card/pocket labels: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title and any additional tag specified for holding library code: 2 lines. Blank lines separate text groups • SLB - spine label and one four-line pocket label. Label set produced: — 1 spine label: up to 9 lines of 8 characters each for call number and input stamps 1 card/pocket label: 5 text lines Call number: 1 line Main entry (author or uniform title): 2 lines Title and any additional tag specified for holding library code: 2 lines No blank lines • SP1 - spine label only. Label set produced: — 1 spine label: up to 9 lines of 8 characters each for call number and input stamps — No card/pocket labels **Note:** The client does not directly support the SP2 format (two spine labels, no card/ pocket labels). To produce two spine labels, use the SP1 format and print two copies of the label.
3	Select the type of label stock you want to use: Under **Form**, select: • **Continuous** to print on continuous tractor-feed stock on a dot-matrix printer Or **Sheet** to print on single-sheet stock using a laser printer
4	Enter a tag for pocket labels. (See “Define a tag for pocket labels” below.)
5	To specify a column and row to start printing labels, click the **Prompt for Options** check box. (Available only for sheet label stock. Unavailable for continuous stock.) **Results:** • The next time you start label printing, the client opens the Column and Row Options window. • Use the window to specify the column and row where you want to start printing the first label set

	Action
6	To print labels to a text file, select the **Output to Text File** check box. In the adjacent text box, type the full path and file name of a text file. Or Accept the default text file and path: **X:\\Documents and Settings*[user name]*\Application Data\OCLC\Connex\Db\Labels.txt** Or Click **Browse** and navigate to another text file. Then click **Open**. **Default:** Check box cleared. Labels print to your specified label printer, not to a text file **Results:** With the print-to-file option selected: • Labels print to the specified file instead of a printer • When you print more labels to the file, they are appended to any existing labels in the file. • The client continues to print labels to the file until you clear the check box. • Text files support the ALA character set used in the client to enter diacritics and special characters.
7	Specify print offset information: 1. Under **Print Offsets**, in the **Top** and **Left** boxes, enter a decimal number for the amount of space to add or subtract from the top margin of labels. To subtract space enter a negative number (**example: -.1** or -.2). (See print offset examples below.) **Default:** 0.0 for top and left **Caution:** Do not specify the margin (total distance between the edge of the label and the edge of the label text). Enter only the amount of space you want to add or subtract from the margin. 2. Under **Units**, select Inches or **Centimeters** to specify the unit of measurement you want to apply to the offsets. **Default:** Inches
8	Define automatic stamps for spine labels. See procedure below.
9	Print a test label: Click **Print Alignment Label**. **Result:** The client prints a sample label in the current label format using a pattern of Xs to represent placement of text on the label stock.
10	Click **OK** or press <Enter> to apply the settings and close the Label Printing Options window. Or Click **Cancel** to cancel changes. You are returned to the **Printing** tab.
11	Click **OK** or press <Enter> to apply any other settings you changed in the **Printing** tab and close the Options window. Or Click **Apply** to apply settings without closing the window. Or Click **Cancel** to cancel changes you made in the **Printing** tab.

Print offset examples

If label text prints ...	Specify these offsets ...
On the left edge of the label, with acceptable top margin	Top: 0
On the left edge of the label, with unacceptable top margin (tops of letters in label text are cut off)	Top: .2 in. or .5 cm. Left: .2 in. or .5 cm.
Too far to the right and too far down (extra space above label text)	Top: -.2 in. or -.5 cm. Left: -.2 in. or -.5 cm.

- **Define automatic stamps for spine labels**
  Use this feature to supply text to print above or below the call number on all spine labels or on spine labels for a specified holding library code. For example, you can add an automatic stamp that identifies a branch library or a special collection.

	Action
1	On the **Printing** tab (**Tools > Options**), under Labels, click **Label Options**.
2	In the Label Printing Options window, click **Define Automatic Stamps**.
3	In the Define Automatic Stamps window, enter up to three lines of text. **Guidelines:** • Enter up to 8 characters per line • To leave a blank line in the automatic stamp, place the insertion point in the text box for the blank line and press the spacebar once.
4	To use the stamp for all labels, select **Use as default automatic stamp**. Or To use the stamp for labels for a specific holding library, select **Assign automatic stamp to holding library code** and enter the holding library code in the text box below the button.
5	Determine where the stamp appears on the label. Select **Place stamp above call number** (stamp appears above and to the left of the call number), or select **Place stamp below call number** (stamp appears below and to the right of the call number).
6	Click **Add**. **Results:** • If you created a default automatic stamp, it appears by name–*Default*–in the Automatic Stamps Defined list. The client adds it to all spine labels. • If you created an automatic stamp for a holding library code, the stamp appears in the Automatic Stamps Defined list by the holding library code–for example, *oclc*. The client adds the stamp to all labels for that holding library.
7	To delete an automatic stamp, select it in the Automatic Stamps Defined list, and then click **Delete**.
8	Click **OK** or press <Enter> to apply the settings and close the Label Printing Options window. Or Click **Cancel** to cancel changes. You are returned to the **Printing** tab.
9	Click **OK** or press <Enter> to apply any other settings you changed in the **Printing** tab and close the Options window. Or Click **Apply** to apply settings without closing the window. Or Click **Cancel** to cancel changes you made in the **Printing** tab.

- **Define a tag for pocket labels**
  Enter a MARC tag containing content you want to print automatically following the title data on pocket labels:

	Action
1	On the **Printing** tab (**Tools > Options**), under **Labels**, click **Label Options**.
2	In the Label Printing Options window, in the **Tag on Pocket Label** text box, type a tag number or tag number and subfield codes that contain content you want to print on pocket labels. • Type numbers and subfield codes with no spaces or delimiters. **Examples:** **999** (prints all subfields in first 999 field) **999a** (prints first 999 field, first ‡a only) **999ab9** (prints first 999 field, first ‡a, ‡b, and ‡9) • Maximum characters in 2-line pocket title: first line, 28 characters; second line, 27 characters (excludes the space the client uses to separate title data from tag data) **Results:** • The content of the specified tag (field or field/subfields) is printed on the second line of the title on pocket labels. • If the title data occupies only the first line, the tag data is placed on the second line and indented one space.If the title data wraps to the second line, the tag data is right-justified. • If the second line of the title is 20 characters and the auto stamp is more than 7, the tag data overwrites the second-line title data. • If the tag data is longer than 27 characters, it is truncated. • Specified subfields print in the order you enter them, not in the order they appear in the record field. • The tag you specify works whether you print using **View > Label or File > Print Label(s)**.
3	Click **OK** or press <Enter> to apply the settings and close the Label Printing Options window. Or Click **Cancel** to cancel changes. You are returned to the **Printing** tab.
4	Click **OK** or press <Enter> to apply any other settings you changed in the **Printing** tab and close the Options window. Or Click **Apply** to apply settings without closing the window. Or Click **Cancel** to cancel changes you made in the **Printing** tab.

- **Select a font type and size for printing labels**

	Action
1	On the **Fonts** tab (**Tools > Options**), select a font type for printing labels: In the **Font** list, under **Label Printing**, select the name of a font. The list shows all fonts installed on your workstation. **Default:** ALA BT Courier (installed on your workstation when you install the client; includes the ALA character set for displaying and printing diacritics and special characters)
2	Select a font size for printing labels: In the **Size** list under **Label Printing**, select a font size, or highlight the size shown and type a font size. **Default:** 12 pt
3	When finished selecting a font and font size(s), click **Close** or press <Enter> to apply the settings and close the Options window. Or Click **Apply** to apply the settings without closing the window.

- **Print labels in boldface or regular type**

	Action
1	On the **Fonts** tab (**Tools > Options**), under **Label Printing**, select or clear the **Boldface** check box. A check mark indicates that it is selected. **Default:** Check box cleared. Labels print in regular type.
2	When finished, click **Close** or press <Enter> to apply the settings and close the Options window. Or Click **Apply** to apply the settings without closing the window.

Accessions lists

Print accessions lists to an HTML file

To print accessions lists to a file instead of a printer:

	Action
1	On the **Printing** tab (**Tools > Options**), click **Accessions List Options**.
2	In the Accessions List Options window, click the **Output to File** check box.
3	In the adjacent text box, type the full path and file name of a text file: Or Accept the default file and path. **Default** file for accessions lists: **X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Db** Or Click **Browse** and in the Windows Open window, navigate to another file and click **Open**. **Default:** Check box cleared. Accessions lists print to your default printer in Windows, not to a file. **Results:** With the print-to-file option set: • The first time you print an accessions list, the client creates the file and prints the list to the file. • The next time you print an accessions list, the client asks if you want to overwrite existing data in the file or cancel printing. • The client continues to print accession lists to the file each time you print an accessions list, until you clear the check box. **Caution:** Each time you print an accessions list to a file, the data overwrites any existing data in the file.
4	Click **OK** or press <Enter> to apply the settings and close the Label Printing Options window. Or Click **Cancel** to cancel changes. You are returned to the **Printing** tab.
5	Click **OK** or press <Enter> to apply any other settings you changed in the **Printing** tab and close the Options window. Or Click **Apply** to apply settings without closing the window. Or Click **Cancel** to cancel changes you made in the **Printing** tab.

Define a tag to print at the end of each accessions list entry

Enter a MARC tag containing content you want to print automatically at the end of each accessions list entry:

	Action
1	On the **Printing** tab (**Tools > Options**), click **Accessions List Options**, and in the Tag on Accessions List text box, type a tag number or tag number and subfield codes that contain content you want to print at the end of each list entry. Type numbers and subfield codes with no spaces or delimiters. **Example:** **856a** (prints first 856 field, first ‡a only) **Results:** • The content of the first instance of the specified tag (field or field/subfields) is appended to the end of the accessions list entry, preceded by two blank spaces. • If you type a tag number only, all data in the first instance of the field is added to accessions list entries. If you specify a tag number and subfield code(s), only the data in the subfield(s) of the first instance of the field is added. See more in Cataloging/Print Labels and Accessions Lists, “Print accessions lists.”
2	Click **OK** or press <Enter> to apply the settings and close the Label Printing Options window. Or Click **Cancel** to cancel changes. You are returned to the **Printing** tab.
3	Click **OK** or press <Enter> to apply any other settings you changed in the **Printing** tab and close the Options window. Or Click **Apply** to apply settings without closing the window. Or Click **Cancel** to cancel changes you made in the **Printing** tab.

3. Customize keystroke shortcuts

Why customize keystroke shortcuts?

You can perform all functions using only the keyboard. The client provides predefined keystroke combinations for carrying out menu commands, editing, and entering diacritics and special characters. For example, <F1> is the default keystroke for opening client Help. However, you may prefer to create your own shortcuts or change the default key assignments:

- Many users find that they work more efficiently, especially while editing, if they avoid switching between the keyboard and the mouse.
- Customizing the default keystrokes lets you assign your most-used actions to the keys you find most convenient.
- In addition to customizing keystrokes for commands and diacritics and special characters, you can also assign keystroke shortcuts to run macros.
- If you use text strings, you must assign a keystroke or a user tool to enter a text string.

Note: The client keeps your customized shortcuts each time you open or update the program, unless you change the shortcuts or reset to default.

For information about user customization files and about sharing the files, see Getting Started/"User data files."

Create or change a keystroke shortcut

	Action
1	On the Tool menu, click **Keymaps**, or press <Alt><T><K>.
2	In the **Select Keymap File** list, select the keymap file you want to work with.
3	In the Display Commands for Category area, click the button next to the category you want to view, **Menu Item**, **Macro**, or **Character**. **Macros and text strings are not preassigned:** • You can create custom macros to automate routine tasks (see "Use Connexion client macros" for more information). • Also, Connexion client provides some macros, including the Dewey Cutter macro and the "NACO" macro, GenerateAuthorityRecord. • The client does not, however, preassign keystroke shortcuts for running any macros. • To save time, you can assign keystrokes to run macros. Otherwise, you run a macro by going to **Tools > Macros > Manage**, selecting a macro, and then clicking **Run**. • You also have the option to create text strings for frequently used data. To insert text strings, you must assign a keystroke or a user tool. (See "Create custom text strings" and "Assign custom user tools" for more information.)

<table>
<tr><th></th><th>Action</th></tr>
<tr><td>4</td><td>In the corresponding list labeled Menu Items, Macros, Characters, or Text, click to highlight an item.

Results:
If the item has a keystroke, it displays in the Current Shortcut Keys box.
If the assigned keystroke is a default, it is labeled App default.</td></tr>
<tr><td>5</td><td>To assign an additional, alternative shortcut key to an item that has a key assignment, in the Press New Shortcut Key text box, press the keys you want to assign and then click Assign.

Results:
The new shortcut works in addition to the previously assigned key.
The Current Shortcut Keys box in the Keymaps window displays both the new shortcut key and the previous one.
If the previous key assignment was a default key, it is labeled App default.
Because the previous keystroke is still active, it remains on the menus next to the appropriate command after you close and re-open the client.
Or

To assign a new shortcut key to replace an existing key assignment, first click Unassign. In the Press New Shortcut Key text box, press the keys you want to assign, and then click Assign.

Results:
The new shortcut replaces the previous key assignment.
The Current Shortcut Keys box in the Keymaps window displays the new shortcut key.
If the item had a default key assignment, it is also displayed and labeled Disabled.
New keystrokes you assign to menu commands appear on the menus next to the appropriate command after you close and re-open the client.
Tip: To restore a single default keystroke assignment, simply select your reassigned key in the Current Shortcut Keys box and click Unassign. Then select the disabled default key, and click Assign.</td></tr>
<tr><td>6</td><td>When finished, click OK or press <Enter> to apply your changes and close the window.
Or
Click Cancel to cancel changes without closing the window.</td></tr>
</table>

View or print key assignments

Keystroke shortcuts are displayed as a quick reminder next to the corresponding commands on the client menus.
Example:
File > Log On displays the default keystroke shortcut *Ctrl+F1*.

If you change the shortcut for the **Log On** command, the new keystrokes you assign appear next to the command on the menu.

You can view or print a list of only the keystrokes you assigned, or you can view, copy, or print all keystroke assignments.

To view or print **only** key assignments you customized in a keymap file:

	Action
1	In the **Keymaps** window (**Tools > Keymaps**), in the **Select Keymap File** list, select the file you want to view.
2	Click **List All**. The User-Defined Shortcut Keys window displays only key assignments you created. To print the list, click **Print**.
3	When finished, click **Close**.

To view, copy, or print a list of **all** key assignments in a keymap file:

	Action
1	On the View menu, click **Assigned Keys**. **Result:** The Assigned Keys window opens, listing each keystroke combination, its source by file name, and a definition of its function. The list is sorted alphabetically by keystroke combination.
2	Optional. To re-sort the list, click the column heading by which you want to sort.
3	Optional. To print the list, click **Print**.
4	Optional. To create a customized list, click **Copy to Clipboard** and then paste the list into a word-processor file to edit as needed.
5	To close the list, click **Close**, or press <Enter>.

Unassign a keystroke shortcut

- Default keystroke shortcuts are labeled **(App default)** in lists of keystrokes (**Current Shortcut Keys** box for menu items and characters in **Tools > Keymaps** or **Assigned Keys** window from **View > Assigned Keys**).
- The client keeps these key assignments so that you can always **Reset** them to the program defaults.
- You can disable any keystroke, including an assigned default keystroke, using the **Unassign** button in the **Keymaps** window.
- If an item has both a default and a custom keystroke shortcut, both display in the **Current Shortcut Keys** box for the item. The custom keystroke always overrides the default and appears next to the equivalent command on the menu.

	Action
1	In the **Keymaps** window (**Tools > Keymaps**), in the **Select Keymap File** list, select the keymap file you want to work with.
2	In the **Display Commands for Category** area, select a category (menu item, macro, character, or text), and then select an item that has a shortcut you want to unassign.

	Action
3	In the **Current Shortcut Keys** box, select the shortcut for the item. The **Unassign** button becomes available.
4	Click **Unassign**, and then click **Yes** to confirm or **No** to cancel. **Results:** • If you unassigned a custom keystroke, the client removes the keystroke from the **Current Shortcut Keys** box. • If you unassigned a client default keystroke, the client labels the keystroke **(disabled)**.
5	When finished, click **OK** or press <Enter>.

Disable default keystrokes

To disable all default keystroke assignments:

Action
On the **Keymaps** window (**Tools > Keymaps**), select the **Disable Application Default Shortcuts** check box. A check mark indicates that the option is selected.

Restore default key assignments

To reset all keystroke assignments to the original client keystrokes:

	Action
1	In the **Keymaps** window (**Tools > Keymaps**), in the **Select Keymap File** list, select the keymap file you want to reset.
2	Click **Reset** and then click **Yes** to confirm. **Result:** The client clears keystrokes you assigned, and the default key assignments are reinstated.
3	When finished, click **OK** or press <Enter>.

To reset a single keystroke assignment to the original client keystroke:

	Action
1	In the **Keymaps** window (**Tools > Keymaps**), in the **Select Keymap File** list, select the keymap file containing the key you want to reset.
2	Select the category and item you want to restore. Then select the reassigned key in the Current Shortcut Keys box and click **Unassign**. Click **Yes** to confirm or **No** to cancel.
3	Select the disabled default key, and click **Assign**.
4	When finished, click **OK** or press <Enter>. **Result:** The display of the assigned keystroke next to the menu command reverts to the default once you close and re-open the client.

Manage keymap files

Keymap files--general information

Keymap files store keystroke shortcuts. The Connexion client installs with a default keymap file named **Custom.Keymap.xml**.

The file contains the default keystrokes and/or any keystroke shortcuts you assign or reassign.

Your assignments always override any existing default keystrokes.

To work with keymap files:

	Action
1	In the **Keymaps** window (**Tools > Keymaps**), click **Organizer**.
2	In the **Keymap Organizer** window, you can navigate to, and work with, up to two keymap files in the **Keymap 1** and/or **Keymap 2** areas. The angle brackets (>> or <<) on the buttons (**Browse**, **New**, **Rename**, **Delete**, **Move**, and **Copy**) indicate which keymap area or file the button affects. To toggle between areas (and change direction of angle brackets), click in the area you want to use.
3	To view key assignments in a file, click the plus sign (+) next to a file name. A list of key assignments in the file displays.
4	See procedures below for: • Creating, renaming, or deleting keymap files • Moving or copying key assignments between keymap files When finished working with keymap files, click **Close**, or press <Enter>. You return to the Keymaps tab.

Create, rename, or delete keymap files

	Action
1	In the Keymap Organizer window (**Tools > Keymaps > Keymaps, click Organizer**), click the name of a keymap file you want to work with. Or If the keymap file you want does not appear in the **Keymap 1** or **Keymap 2** list, click **Browse** and navigate to the file. The path name appears under **Current**. The highlighted file name appears in the list. **Default location of keymap files:** **X:\Documents and Settings*[user name]*\Application Data\OCLC\Connex\Profiles\MyProfile**, where **X** is the letter of your hard drive.
2	To create a keymap file in the folder shown under **Current**, click **New**, and type a name for the file.
3	To rename the selected keymap file, click **Rename**, and type the new name over the old one.
4	To delete the selected keymap file, click **Delete**, and then click **Yes** to confirm.
5	When finished, click **Close**.

Move or copy key assignments between keymap files

	Action
1	In the Keymap Organizer window (**Tools > Keymaps, click Organizer**), select keymap files you want to work with.
2	In one **Keymap** area, select the file **to** which you want to move or copy a key assignment.
3	In the other **Keymap** area, click the plus (**+**) sign next to the keymap file **from** which you want to move or copy an assignment. Click the key assignment you want to move or copy. To check the function of the selected key, see the definition under **Description**.
4	Click **Move** to remove the assignment from the original file and place it in the selected file. Or Click **Copy** to keep it in the original file and place it in the selected file.
5	When finished, click **Close**.

Assign a default keymap file

	Action
1	On the Keymaps window (**Tools > Keymaps**), in the **Select Keymap File** list, select the keymap file containing the key assignments you want the client to use.
2	Click the **Default Keymap** check box.
3	When finished, click **OK** or press <Enter> to apply the settings and close the window. Or Click **Cancel** to cancel changes without closing the window.

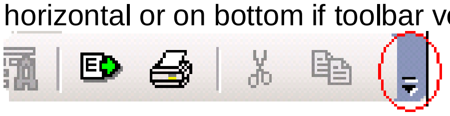
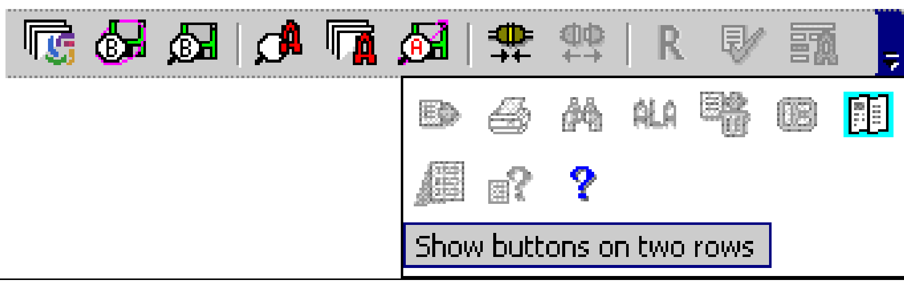
4. Customize the main client toolbar

About customizing the toolbar

The Connexion client supplies a default main toolbar containing selected toolbar buttons, located at the top of the client window, below the menus. For a list of default buttons and more about using the toolbar, see Basics, Use Client Interface, “Toolbars.”

Use procedures in this topic to customize the contents of the toolbar and how it displays.

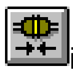
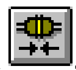
Show the main client toolbar on one line or two

	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.

Add buttons to the client toolbar

	Action
1	On the Tools menu, click **Toolbar Editor,** or press <Alt><T><E>.
2	In the Toolbar Editor window, scroll the **Menu Items** list. When you find a button you want to add, click and hold it, and then drag and drop it where you want it to appear on the toolbar. **Results:** • The button is on the toolbar. • The image of the button also remains in the Toolbar Editor list, but you cannot add the button to the toolbar again.
3	When finished, click **Close**, or press <Enter>.

Tip: To see the name of any button on the toolbar, move the cursor over the button until a popup ToolTip opens. The ToolTip shows the corresponding menu and command.

Example: The ToolTip for  is *FileLogon*. When you click , the action is the same as clicking **Logon** on the File menu.

For a complete list of available toolbar buttons for menu commands, see "Menus (commands, keystroke shortcuts, and toolbar buttons)" in Basics/Use Client Interface.

Remove buttons from the toolbar

	Action
1	Open the Toolbar Editor window (**Tools > Toolbar Editor**). Click the button you want to remove and hold it, and then drag and drop it into the Toolbar Editor.
2	When finished, click **Close**, or press <Enter>.

Change the position of buttons on the toolbar

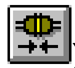
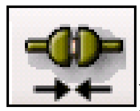
Action
Press and hold the <Alt> key while you drag and drop a button in the toolbar to a new location.

Reset the toolbar to the default

	Action
1	In the Toolbar Editor window (**Tools > Toolbar Editor**), click **Reset**.
2	Click **Yes** to confirm. The toolbar returns to the original buttons in the original order.
3	When finished click **Close**, or press <Enter>.

For a list of buttons on the default toolbar, see Basics, Use Client Interface, "Toolbars."

Select toolbar button size

	Action
1	Click **Tools > Options**, and then click Toolbar.
2	Under **Toolbar Button Size**, click a button to select one of the following: • **Standard** (19x17 pixels: example: ) • **Large** (38x34 pixels; example: )
3	When finished, click **Close** or press <Enter> to apply the settings and close the Options window. Or Click **Apply** to apply the settings without closing the window. **Note:** When you change toolbar button size, the new setting does not take effect until you close and reopen the client.

Stored toolbar settings

The client stores any changes you make to the toolbar. Your customized toolbar is retained each time you open or update the program.

Caution: If the default 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 buttons.

5. Assign custom user tools

Assign or unassign generic user tools

Assign up to 10 generic user tools to:

- Insert a character
- Run a macro
- Issue a menu command
- Insert a text string

	Action
1	Open the User Tools window: Click **Tools > User Tools > Assign**, or press <Alt><T><T><A>. Or Click the icon and name on the user tools quick tool, , or click the arrow to the right of the icon and name to expand a list, and then click **Manage**. See more below about using the quick tool below.
2	In the User Tools window, under **Display Commands for Category**, click one of the following categories to select an assignment for a user tool: • Character • Macro • Menu Item • Text The list below the **Display Commands for Category** shows the available selections for that category.
3	Select an item in the list.
4	In the **Select New User Tool** list, click a user tool number you want to assign.
5	Click **Assign**. The client assigns the user tool and supplies a default description of the tool. • The description displays under **Description Assigned** in the User Tools window. • The **Tools > User Tools** menu also displays descriptions for each assigned user tool. • To change the default description of the user tool, follow the procedure below. **Note:** You must click **Assign Tool**. If you only click **OK**, the user tool is not assigned. After you click **Assign Tool**, the **OK** button becomes a **Close** button.
6	To view all current user tool assignments, click **List All**.
7	When finished, click OK or Close press <Enter> to close the window. Or Click Cancel **to cancel changes you made before using the Assign Tool button and close the window.**

Unassign or change a user tool assignment

	Action
1	In the User Tools window, select the category and item you want to unassign or change. The user tool currently assigned to the item displays in the Current User Tools box.
2	To unassign a user tool assignment, select the user tool in the **Current User Tools** box, and click **Unassign Tool**.
3	Once the current user tool is unassigned, to reassign the selected item to a different user tool, follow steps 4 - 6 in the procedure above. **Note:** If you do assign a second user tool to an item without first unassigning the one currently assigned, both user tools remain assigned to the same item. To eliminate the duplication, select the first assigned user tool and click **Unassign Tool**.

View or print a list of assigned user tools

	Action
1	In the User Tools window, client **List All**.
2	In the Assigned User Tools window, click **Print**. **Result:** The printout lists the user tool number and the default description of its assigned item.
3	Click **Close** to return to the User Tools window.

Modify description for tool tip and menu display

The client supplies a default description when you assign a user tool to a character, macro, menu item, or text string.

Example default descriptions:
Character Æ AE, uppercase
Macro Sample!CancelChanges
Menu Item FileLogOn
Text Test insert text string

The user tool description appears in:

- The tool tip pop-up that displays when the cursor is over the toolbar button for the user tool (if you add the button to the toolbar)
- The **Tools > User Tools** menu list item for the user tool

To change a description for an assigned user tool (either the default description or a description you have already changed and want to change again):

	Action
1	In the User Tools window, select a category: **Character**, **Macro**, **Menu item**, or **Text**.
2	In the list on the left, select the character, macro, menu item, or text string that has an assigned user tool for which you want to change the description.
3	In the **Current User Tools** box, click the currently assigned user tool. The **Unassign Tool** and **Modify Description** buttons become available.
4	Click **Modify Description**.
5	Click **Assign**.
6	Click **OK** to save your change or **Cancel** to cancel. **Results:** • The new description appears in: — The tool tip that pops up when you put the cursor over the user tool button on the toolbar. — The name for the user tool in the Tools > User Tools menu list.

Example:

The default description of the OCLC Four Figure Dewey Cutter Macro is *Macro Dewey!FourFig*. You assign the Dewey macro to a user tool and click **Modify Description** to change the description to **Run Dewey Macro**.

Note: The default description is retained in the list displayed when you click **List All**.

Use assigned user tools

Action
Click **Tools > User Tools** and then click **1, 2, 3, etc**. **Notes:** • Only user tool numbers you have assigned are available. Unassigned numbers are grayed out (unavailable). • Descriptions display on the menu to all assigned user tools Or Use the User Tools quick tool on the toolbar (see procedure immediately below). Or Use access key shortcuts. Press <Alt><T><T><1>, <Alt><T><T><2>, <Alt><T><T><3>, etc. Or Add toolbar buttons for assigned user tools to the toolbar, and then click a user tool button. **Note:** To display the description for a user tool in a tool-tip pop-up, move the cursor over its toolbar button.

Alternative: Use the user tools quick tool

By default, the client displays a quick tool for user tools:

Use the user tools quick tool:

	Action
1	**To assign or unassign or to view or print user tools:** Click the quick tool name **User Tools** and icon. Or Click the arrow to the right of the icon and name, and then click **Manage**. The User Tools window opens. See procedures above for managing user tools.
2	**To use assigned user tools:** Click the arrow to the right in the **User Tools** quick tool icon, and click to select a user tool. **Note:** Only assigned user tools appear on the list. Default descriptions of each user tool are shown in parentheses; if you modified descriptions, the client shows your descriptions.

To hide or re-display quick tools:

Action
Click **View > Toolbars > Quick Tools**. A checkmark indicates that the quick tools are displayed. **Note:** For purposes of displaying/hiding or repositioning, the text string and user tools quick tools are a single unit. You cannot move them separately.

Stored user tool assignments

The client stores any assignments you make to user tools. Assigned user tools are retained each time you open or update the program.

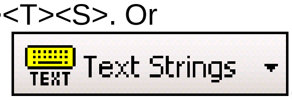
For information about client customization files and sharing files, see Basics, Get Support and Information, “User data files.”

6. Create custom text strings

About text strings

- Create a text string of data you use frequently to insert in records.
- Text strings can:
    - Be used to supplement constant data
    - Include diacritics or special characters
    - Include multiple fields
- To insert text strings in records:
    - Go to **Tools > Text Strings**, select a text string, and use the Apply button.
    - Go to **Tools > Text Strings**, select a text string, and use the **Keymaps** or **User Tool** button to assign to a keystroke or user tool.
    - In the **Text Strings** quick tool, which displays by default on the toolbar, click the arrow next to the right to view the list, and then click a text string to insert it.
- You can insert text strings in bibliographic and authority records and in bibliographic and authority constant data records.

Create a text string

	Action
1	On the Tools menu, click **Text Strings**, or press <Alt><T><S>. Or Click the icon and name on the text strings quick tool, , or click the arrow and then click **Manage** in the list. See more below about using the quick tool below.
2	In the Text Strings window, click **Add**.
3	In the Add/Modify Text Strings window, in the **Description** box, enter a unique description for the text string you want to create. **Notes:** • Do not use single quotation marks (**‘**) in the description. • The client will not accept a description if it is already used for another text string.
4	In the **Text** box, enter the text. • When you enter a field, type the tag, indicator 1, indicator 2, and the first character of the data with no spaces between them. **Examples: 24510This is the title** **590 This is a note** (includes 2 spaces between tag and field data for blank indicators 1 and 2) • Press <Enter> between fields if you enter multiple fields. **Note:** There is no limit on the number of characters in a text string.

	Action
5	**Optional.** Enter diacritics or special characters in the description or the text string: Place the cursor where you want to insert a diacritic or character and click **Enter Diacritics**. In the Insert Diacritics and Special Characters window, click the image or the name of the character you want to insert. See “Insert diacritics and special characters for more information” for more information.
6	**Optional.** To cut, copy, or paste text to create a text string, or to insert Unicode characters to control display of bidirectional data in Arabic or Hebrew fields, right- click in the Text box, and then click: • **Cut** • **Copy** • **Paste** • **Insert Unicode Control Characters** See Cataloging, International Cataloging, “Use Arabic scripts for cataloging” for more information about Unicode control characters.
7	When finished, click **OK**. **Results:** • The description and text string appear in the **Current Text Strings** list. The list is automatically alphabetized by descripition. Click a column heading to alphabetize by data in that column. • All text strings you create are displayed in the list. • If you assign a keystroke or a user tool for inserting a text string, the list shows which are assigned to each text string. • If you entered multiple fields, in the display, the line break is represented by ***/n***. Or Click **Cancel** to cancel creating a text string.

Edit a text string

	Action
1	In the Text Strings window, select the text string you want to edit and click **Modify**.
2	In the Add/Modify window, edit the text string and/or description as needed.
3	**Optional.** Enter diacritics or special characters in the text string: Place the cursor where you want to insert a diacritic or character and click **Enter Diacritics**. In the Insert Diacritics and Special Characters window, click the image or the name of the character you want to insert. See Cataloging, Edit Bibliographic Records, “Insert diacritics and special characters” for more information.
4	When finished, click **OK**. (Same results as for creating a new text string.) Or Click **Cancel** to cancel editing the text string.

Delete a text string

	Action
1	In the Text Strings window, select the text string you want to delete and click **Delete**.
2	Click **Yes** to confirm or **No** to cancel.

Insert a text string in a record or workform

	Action
1	With a record open, place the cursor in the location where you want to insert a text string.
2	Go to **Tools > Text Strings**, select the text string you want to insert, and click **Apply**. Or Use the **Text Strings** quick tool on the toolbar, as described below. Or Press the keystroke shortcut you assigned to the text string. Or Click the User Tool you assigned to the text string. See instructions below for assigned a keystroke shortcut or a user tool to insert a text string. **Results:** • If you insert the text string into a single cell (for example, the field data cell), the cursor is placed at the end of the text string. • If you insert a text string that spans a full field or multiple fields, the cursor remains in the first cell where you inserted the text string.

Use the text strings quick tool

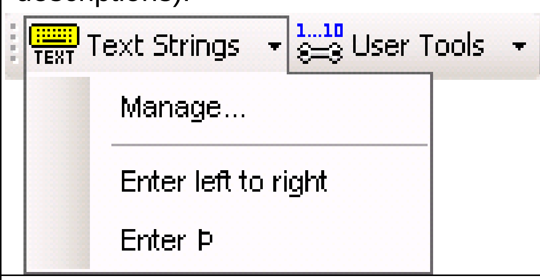
By default, the client displays a quick tool for text strings:

Use the text string quick tool:

	Action
1	**To create, unassign, view, or print text strings:** Click the **User Tools** quick tool icon and name. Or Click the arrow to the right of the icon and name, and then click **Manage**. The Text Strings window opens. See procedures above for managing text strings.

	Action
2	**To insert text strings:** With the cursor at the location in a record where you want to insert a text string, click the arrow to the right in the **Text String** quick tool, and click to select a text string. **Note:** Text strings are listed by the descriptions you assigned when you created them.
3	**To hide or re-display quick tools:** Click **View > Toolbars > Quick Tools**. A checkmark indicates that the quick tools are displayed. **Note:** For purposes of displaying/hiding or repositioning, the text string and user tools quick tools are a single unit. You cannot move them separately.

Examples of inserting characters using the text strings quick tool:

	Action
1	Follow steps 5 and 6 in the procedure above to create a text string for inserting uppercase thorn with description **Enter Þ**. Create another text string for for inserting the Unicode control character for “Enter left to right” with the description **Enter left to right**.
2	To insert a character, place the cursor in a record where you want to insert and click the arrow on the text strings quick tool to expand the list of text strings (listed by descriptions): 
3	Click **Enter left to right** to insert the LRM Left-to-Right Mark bidirectional formatting character in Arabic or Hebrew script data. Or Click Enter Þ to enter uppercase thorn.

Optional: Assign a keystroke to insert a text string

	Action
1	In the Text Strings window, click **Keymaps**.
2	The Keymaps window opens. Follow the procedure to select a text string and assign a keystroke given in “Customize keystroke shortcuts.” **Note:** You can also assign or change a keystroke assignment by opening the Keymaps window directly (**Tools > Keymaps**).

Optional: Assign a user tool to insert a text string

	Action
1	In the Text Strings window, click **User Tools**.
2	The User Tools window opens. Follow the procedure to select a text string and assign a user tool given in “Assign custom user tools.” **Note:** You can also assign or change a user tool by opening the User Tool window directly (**Tools > User Tools > Assign**).

Note: If you assign keystrokes or user tools, the **Current Text Strings** list (**Tools > Text Strings**) shows the assignment(s) for each text string.

Print a list of text strings

Action
In the Text Strings window, click **Print**. **Result:** Lists each text string on a separate line. For each, prints the description, the text, and the keystroke or user tool you assigned to insert the text string, if any. **Tip:** To print the list in a different order, re-sort the list by clicking on a column heading before printing. By default, the list is sorted alphabetically by text string descriptions.

Text string files

- The client stores your text strings in a single file named **TextStrings.xml**. This is the only file the client allows for text strings.
- The file is located in:

  X:\Documents and Settings*[user name]*\Application Data\OCLC\Connex\Profiles\MyProfile, where **X** is the letter of your hard drive

- Also stored in this location are:
  - Keymap file containing assigned keystrokes, including those you assign for entering text strings (**default: Custom.Keymap.xml**).
  - File that contains user tool assignments (along with other option settings), **Options .xml**.
- Assigned text strings are retained each time you open or update the program.

For information about user customization files and about sharing files, see “User data files.”

Import text macro files from RLIN21

	Action
1	In the Text Strings window, click **Import**. See step 1 of the first procedure in this topic to open the Text Strings window.
2	In the Import Text Strings window, navigate to the text macro file you want to import, and click **Open**. **Results:** • The window closes and imported text strings and their descriptions display in the **Current Text Strings** list of the Text Strings window. • If you previously used keystroke shortcuts to insert text strings, the keystrokes are not imported with the text strings. • To assign keystrokes, go to **Tools > Keymaps** and select the **Text** button, or click **Manage** in the **Text Strings** quick tool list.

7. Create multiple user profiles for options and customizations

About user profiles

- Create and use multiple profiles if you catalog for more than one institution code and need to set different options and customizations for each.
- **Most users** do not need multiple user profiles. You are **not required** to create or select or use the Profile function to use the client.
- When you install and open the client, the program creates a default user profile containing:
    - Default settings for options (for first-time installation)
      Or
    - Your customized settings from the previous version (for upgrade)
- The default user profile is in a folder named **MyProfile** in the following location and contains the following files:

  X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Profiles\MyProfile,
  where **X** is the letter of your hard drive

  The default **MyProfile** folder contains:
  Custom.Keymap.xml
  Options.xml

  Other files are added to **MyProfile** when you use the corresponding functions:
  TextStrings.xml
  AppExclusions.Keymap.xml
  UserLogonInfo.xml

Create a new user profile

	Action
1	On the Tools menu, click **Profiles**, or press <Alt><T><P>.
2	At the bottom of the Profile Manager window, under Create a New Profile, select one of the following options as a basis for creating a user profile: • **Use system default settings** • **Copy settings from profile highlighted above** (if you select this option, select the profile you want to use in the **Profile Name** list)
3	In the **Name** box, type a unique name for the profile.
4	Click Create. (The Create button remains unavailable until you enter a name.) **Result:** The profile name is added to the **Profile Name** list.

	Action
5	To customize the options and settings for the new profile, either now or later: Select the new profile name, and click **Set as Default**. **Results:** • The client gives you a warning that the following will happen: • All open local files close. • The client logs you off, if you are logged on. • The default local files associated with the new profile, if any, open automatically. Click **Yes** to proceed or **No** to cancel.
6	When finished, click **OK**. **Results:** • The new description and text string appear in the **Current Text Strings** list. • If you entered multiple fields, the line break is represented by **/n** for purposes of display in this list. • You must assign a keystroke or a user tool to complete creating a text string. These are the only two ways to insert a text string. Or Click **Cancel** to cancel creating a text string.
7	When finished, click **Close**.

Delete a profile

	Action
1	In the User Profile Manager window (**Tools > Profiles**), select the profile you want to delete from the **Profile Name** list.
2	Click **Delete**.
3	Click **Close** when finished.

Note: You cannot delete the default profile. If the default profile is selected, the **Delete** button is unavailable. To delete the default profile, you must first make another profile the default, close the Profile Manager window, and re-open it (**Tools > Options > Profiles**). Then you can select the former default profile and click Delete.

Select a startup macro for a user profile

To run a macro or start an action automatically each time you open the client using a specific user profile, open the user profile for which you want to select a startup macro or action. Follow the procedure in the section on running a startup macro or client action in “Set up communications and log on.”

8. Customize the spell checker

About the spell checker and files

- Use the spell checker to verify English language spelling in records (**Tools > Check Spelling** or <F7>). See more about how to check spelling in Cataloging/ Edit Bibliographic Records, "Check spelling in records."
- The spell checker skips (accepts as correct) diacritics and special character in the ALA character set that the client supports.
- The spell checker skips (accepts as correct) non-Latin script data.
- Settings for the spell checker are stored in **Options.xml**, except for the user dictionary, which is a separate file, **user.dic**.
- Both **Options.xml** and **user.dic** are stored in: **X:\Documents and Settings***[user name]***\Application Data\OCLC\Connex\Profiles\MyProfile** (**X** = the letter of your hard drive).
- To customize the way the spell checker works, check or change default settings as described in this topic.

Set general spell checker options

To skip certain types of words during spell checking:

	Action
1	On the Tools menu, click **Options**, or press <Alt><T><O>, and then click the **Spelling** tab.
2	Click **General Options**.
3	Click check boxes to select or clear these options. • Ignore capitalized words. **Default:** Cleared; checks capitalized words • Ignore words in uppercase **Default:** Cleared; checks words in all uppercase • Ignore words with numbers **Default:** Cleared; checks words with numbers (for example, *Win2000*) • Ignore domain names **Default:** Selected; ignores domain names (for example, *www.oclc.org*)
4	Click **OK**, or **Cancel** to cancel your changes. **Result:** The window closes and you are returned to the **Spelling** tab.
5	When finished, click OK or press <Enter> to apply your changes and close the window. Or Click **Cancel to cancel changes without closing the window.**

Customize fields to check and subfields to skip

The spell checker checks only fields specified in options. To check or change the default fields/subfields:

	Action
1	In the **Spelling** tab (**Tools > Options**) under **Customize Fields**, click **Fields to Check**.
2	To add a field to check, in the Customize Fields to Check window, type a tag in the **MARC Field Tag** box, and then click **Add**.
3	To add a field to check and specify subfields to skip, type a tag in the **MARC Field Tag** box, type subfields to skip within the field in the **Skip Subfields** box, and then click **Add**. Type subfield delimiter letters or numbers with no spaces. **Example:** In the **MARC Field Tag** box, type **760**. In the **Skip Subfields** box, type **wxy7**. **Note:** To add subfields to be skipped to a field already in the list, you must first delete the field, re-enter it, specify the subfields to skip, and then click **Add**. See default fields to check/subfields to skip.* **Note:** The spell checker checks spelling only in the fields specified in this list.
4	To delete a field, highlight the tag in the list and click **Delete**.
5	When finished, click **OK** to save your changes or **Cancel** to cancel your changes. The window closes and you are returned to the **Spelling** tab.

*Default fields to check/subfields to skip:

245 skip c	513 skip b	538
246 skip f	515	546
516	547 skip f	500
520 skip u	580	502
521	730 skip f	504
525	740	505 skip gru
530 skip u	830 skip v	510 skip c
533 skip m7		

Option to skip only name information in field 505

In some 505 fields, name information appears between a slash and double hyphens. To skip only name information during spelling:

Action
In the **Spelling** tab (**Tools > Options**) under **Customize Fields**, click to select the check box labeled **For 505, ignore data between / and --**. **Example:** With the option selected, the spell checker skips only the data in the 505 field shown in italics in the following: Love and peril / *the Marquis of Lorne* -- To be or not to be / *Mrs. Alexander* -- The Melancholy hussar / Thomas Hardy **Default:** The check box is cleared. The spell checker does not skip data between a slash and a hyphen in the 505 field.

Customize spell checker dictionary

The spell checker dictionary contains words to skip (accept as correct) during spell checking. You can expand or otherwise customize the dictionary by adding, editing, or deleting words, by importing the contents of the spell checker user dictionary you used with OCLC Passport or CatME, or by changing the main language of the dictionary.

To add, edit, or delete words or import the contents of your former dictionary:

	Action
1	In the **Spelling** tab (**Tools > Options**) under **Dictionaries**, click **Edit User Dictionary**. In the Edit User Dictionary window, the free-text edit box contains **default words*** provided when you installed the software (see list of default words below).
2	To add or edit words: Use the free-text edit box to edit existing entries as you would in a text file. When you add words: • Add the words anywhere in the list or to the top or bottom. The client alphabetizes the list when you close and re-open the Edit User Dictionary window. • Press <Enter> after adding an item. Make sure that each item in the dictionary is on a separate line.

	Action
3	**Optional.** To import the contents of yoiur former spell checker dictionary from OCLC Passport or CatME: 1. Click **Import**. By default, the Windows Open window opens to the folder containing your previous customized user dictionary file: X:\oclcapps\lex\userdic.tlx (**X**=letter of your hard drive). **Note:** The client appends the contents of the Passport or CatME dictionary to the client spell checker dictionary. If you want only the dictionary contents from Passport or CatME, you must delete the client default dictionary contents before importing. 2. Select **userdic.tlx** and click **Open**. **Results:** • The client adds the words in **userdic.tlx** to the end of the list in your client spell checker dictionary. • To re-sort the dictionary list in alphabetical order, close the Edit User Dictionary window. When you reopen, the entire list is in alphabetical order. • The client does not add duplicate entries. **Note:** You can import content from other files with file extension ***.tlc**. If you try to import a file with any other file extension, you get an error message.
4	When finished, click **OK** to save your changes or **Cancel** to cancel changes. **Result:** The window closes and you are returned to the **Spelling** tab.

*Default words in the spell checker dictionary:

1910s	19th	j
1920s	1st	k
1930s	20th	l
1940s	2nd	m
1950s	3rd	n
1960s	4th	o
1970s	5th	oclc
1980s	6th	p
1990s	7th	q
10th	8th	r
11th	9th	s
12th	AACR	t
13th	AACR2	u
14th	b	videorecording
15th	c	w
16th	f	y
17th	g	z
18th	h	

To select the language of the main spell checker dictionary:

Action
In the **Spelling** tab (**Tools > Options**) under **Dictionaries**, select a language from the **Main Dictionary Language** list. Languages available are: • English (Canada) • English (Great Britain) • English (United States) (default)