Basics:
Get Support and Information

Last updated: September 2019

Revision History

Date	Section title	Description of changes
March 2012	3 Open Web services from the Help menu	New link in the Help > Useful Web Links submenu to open the prototype OCLC Classify Web service in an independent browser window
	4 Launch OCLC cataloging-related services	New section added from client Help with instructions for opening the following services from within the client: • WebDewey • Local holdings maintenance service
April 2011	1 Use client Help	• Updated information about Help topic toolbar • Added instructions for setting up and using RDA Toolkit (available only to subscribers)
	2 Get support	Deleted outdated reference to "regional service providers"; support is available through OCLC Customer Support.
	4 View your OCLC usage statistics	New section
January 2008	2 Get support	Deleted reference to outdated CatME/Connexion comparison document
	5 Find user information for troubleshooting	Revised section titles

Table of Contents

1   Use client Help

About the client Help file

The electronic Help file for Connexion client, **clienthelp.chm**, is automatically provided and updated when you install or update the Connexion client software.

It is located at:
X:\Program Files\OCLC\Connexion\Program\clienthelp.chm (**X** represents the letter of your hard drive).

Caution for using Help with Windows Vista and Windows 7:

- The main Connexion client Help file (**clienthelp.chm**) works well in all supported Windows operating systems.

- However, a few legacy client Help files (***.hlp**) run on a Help engine no longer supported for Vista or Windows 7.

- The affected parts of client Help are:

  — Context-sensitive Help topics specifically for export settings windows

  — OML and Basics Help for macros (**osbl5x.hlp**)

  — Macro Editor Help (**osbi5x.hlp**)
  Note: Help topics on client-specific macro commands **are not affected**. Client-specific macro Help topics are in the main client Help file **clienthelp.chm**.

- If you use Connexion client with Vista or 7 and need to use the legacy Help topics listed above, you must download and install the **WinHlp32.exe** Help engine.

  Go to the Microsoft Web site for details and instructions: **http://support.microsoft.com/kb/917607**.

- With the WinHlp32.exe file installed and the macro editor/debugger open (to open, for example, click **Tools > Macros > Manage**; select a macro and click **Edit**), you can open the older macro Help systems under Windows Vista or 7:

  — Click the Help button on the macro editor toolbar.

  Note: If you get the following error message, "There was a problem running the macro. (1037)," click **OK**. This is a Microsoft-acknowledged known issue with WinHlp32.exe, but this issue does not interfere with viewing the Editor/Debugger Help topics. If the disabled macros become a problem for other functionality, please see details of known issues and workarounds. at: http://support.microsoft.com/kb/917607#knownissueupdate.

  Problem: The link in the Editor/Debugger Help window to open a list of Connexion-client-specific macro commands does not work and cannot be fixed. If you also want to see macro command descriptions:

  Click inside the client main window to change the focus and press <F1> to open the main client Help. Navigate in the **Contents** tab to the macro commands you want to see (in Client Basics > Use Macros).

  Both Help systems remain open simultaneously.

How to open Help

- With Connexion client open, on the Help menu, click Client Help, or click , or press <F1>.

- Or to get a Help topic specific to the active client window (called a "context-sensitive" Help topic):

  With a client window open, click **Help** (button), or press <F1>.

  A Help topic opens that describes what you can do in the window, how to use it, and how to use each feature and button in it.

- Or to get a MARC field description:

  With the cursor in a field in an open record or workform, on the Help menu click **MARC Field Help**, or press <Shift><F1>, or right-click in a field, and on the shortcut menu click **MARC Field Help**.

  The appropriate description of the field opens in *Bibliographic Formats and Standards* or in *Authorities: Formats and Indexes*. See details below.

- Also see more below about opening variable field descriptions in RDA Toolkit (you must be a subscriber to RDA Toolkit).

- To close Help: Click **X** in the upper right corner, or press <Alt><F4>.

The Help window

Client Help displays in an HTML Help window. The window has two panes. The pane on the right (1) displays topics and provides a topic toolbar at the top. The pane on the left provides (1) navigation tabs for various ways to find the Help topic you need and (2) a basic navigation toolbar. These are all described in detail below.

Notes:

- By default, the client Help always remains on top when you open it. You can move, resize, or minimize it if needed. You can also display only the topic pane to save space (see details below).

- By default, the focus in Help is in the navigation pane. To quickly change focus to the topic pane, for example to scroll a topic, press <F6>.

The Help navigation tabs

Contents

Organizes Help topics into a table of contents, much like a printed user guide, with topic titles as links to open topics.

- To open a topic, in the Contents tab, click the plus (+) sign in front of a book ( ), or click its title to open it ( ). Then click a topic ( ).

Index

1. To open a topic, in the Index tab, begin typing a keyword or phrase in the text box. The list displays the closest match.

2. Highlight an entry and click **Display** or press <Enter>. Or double-click an index entry. If more than one topic is linked to the index term, a list displays in a **Found Topics** window. Double-click a topic name, or click to highlight the name, and then click **Display** to open a topic.

Search

Searches all topics in the Help file. (Use the quick search box in the Help topic toolbar to search the open Help topic only. See more below.)

- On the Search tab, type a keyword or phrase and click **List Topics** or press <Enter> to do a full-text search. In the list of topics containing the term, double-click a topic.

Favorites

Stores a list of links to open Help topics you refer to often without having to navigate to them.

- In the Favorites tab, the title of the displayed Help topic is shown in the **Current topic** box. Display the topic you want to save and click **Add**. To open a favorite topic, click the Favorites tab, and then click the topic title.

The Help toolbars

Topic toolbar. The Help topic toolbar is at the top of every topic. Hover the mouse over a button or area to see a popup tool tip. The toolbar has the following buttons:

- **Back.** Click to display the Help topic you viewed previously.

- **Forward.** Click to display the Help topic you viewed last.

- **Expand all.** Click to expand all hidden text in the topic.

- **Collapse all.** Click to hide expanded text in the topic.

- **Print topic.** Click to print the current topic, or select a heading in the Contents tab and click the button to print all topics under the heading.

- **Quick search text box.** Enter a search term to search only the current topic. **Note:** To search all Help topics, use the Search tab in the navigation pane on the left.

- **Quick search.** Click to send your search.

- **Remove search hightlighting.** Click to toggle between highlighting your search term in the topic or removing the highlighting.

Help navigation toolbar. Help also has a basic navigation toolbar containing three buttons above the navigation pane. The buttons are:

- **Hide.** Click to close the Help navigation pane but leave the Help topic displayed. After you click the button, the navigation toolbar moves to the top of the Help topic, above the topic toolbar, and the button changes to **Show**. Click to re-display the navigation pane.

- **Back.** Click to display the Help topic you viewed previously.

- **Forward.** Click to display the Help topic you viewed last. Note: You will need these buttons to go back to a topic after opening a Web page by clicking a link in Help, for example, because the topic toolbar appears only in topics.

Drop-down and expanding text links in Help topics

Click drop-down and expanding text links throughout Help to toggle between showing and hiding additional text with more details or an example or illustration.

Caution: Because text "hidden" in drop-down links does not print unless displayed, before you print a topic in Help, click the Expand all button to display all topic content.

MARC Field Help

To open MARC Help for a field:

	Action
1	With a bibliographic or authority record or workform open, click to place the cursor in a field.
2	Click **Help > MARC Field Help**, or click [icon], or press <Shift><F1>. Or Right-click in a field, and on the shortcut menu click **MARC Field Help**. - For a field in a bibliographic record or workform, the client opens your default browser to a description of the field in *Bibliographic Formats and Standards* on the OCLC Web site at http://www.oclc.org/bibformats/. **Note:** For those who use multiple browsers, OCLC suggests setting MS Internet Explorer as the default browser for best viewing of *Bibliographic Formats and Standards*. To check or set the default browser, go to the Windows **Start** menu **> Settings > Control Panel > Add/Remove Software > Set Program Access and Defaults** (in the left navigation pane). - For variable fields in an authority record or workform, the client opens your default browser to a description of the field in *Authorities: Formats and Indexes* on the OCLC Web site at: http://www.oclc.org/support/documentation/worldcat/authorities/authformat/default.htm
3	When finished, click **X** in the upper right corner of the browser window, or press <Alt><F4>.

To open the description of a fixed field element when the fixed field is displayed at the top or bottom of a record, not as a variable field, in **View > OCLC Fixed Field**:

Action
Click a blue underlined link in the fixed field of the displayed record. For example, click ELvl in a record for a description of *Encoding Level* or click Dates for a description of *Date 1 and Date 2.*

Tip: If Internet Explorer (IE) is your default browser and you already have an IE window open, when you click **MARC Field Help**, the *Bibliographic Formats* MARC field description screen replaces the screen already open in the IE window. You can set an IE option to open the MARC field description (and any other Web link you click) in a separate IE window:

1. Open IE (v. 6.0), or close all IE windows except one.

2. On the Tools menu, click **Internet Options** and then click the **Advanced** tab.

3. Under **Browsing**, clear the option **Reuse Windows for launching shortcuts**.

4. Click **OK** to save changes.

5. Close and restart IE for the change to take effect.
   Result: Clicking any link to a Web page, including clicking **MARC Field Help** in the client, always opens the new page in a new IE browser window instead of replacing the window that was already open.

RDA Toolkit field help   RDA = Resource Description and Access

To use RDA Toolkit, you must be a subscriber. See more information on the RDA Toolkit Web site at: http://www.rdatoolkit.org/.

In the client, subscribers must select options to enable its use:

	Action
1	Click **Tools > Options > RDA** or press <Alt><T><D>.
2	In the RDA tab, click the check box next to **Enable RDA Toolkit**.
3	Depending on how access to RDA Toolkit is set up in your subscription: Select the Use IP authentication check box. Or Enter your subscriber user name and password in the **Enter your RDA Toolkit username** and **Enter your RDA Toolkit password** boxes.The client uses your information to log on and display the RDA Toolkit field descriptions. **Please note:** If your library's access is throught a user name and password, and you do not know them, the first step is to ask your local administrator. If your local administrator does not have them, you can open a support ticket at **http://www.rdatoolkit.org/support** or send an e-mail message to **rdatoolkit@ala.org**.
4	When finished, click **Close**, or press <Enter> to apply the settings and close the window. Or Click **Apply** to apply the settings without closing the window (you can set other options). Or Click **Cancel** to cancel changes.

To open an RDA Toolkit field description after you set up as described above:

	Action
1	Whether online or logged off, with a bibliographic or authority record or workform open, click to place the cursor in a field.
2	Click **Tools > RDA Toolkit**. Or Press <Alt><T><D>. Or Right-click in a field, and on the shortcut menu click **RDA Toolkit**. The client opens the RDA Toolkit description of the field in a browser screen. **Notes:** • RDA descriptions are available for variable fields, not for fixed fields. • OCLC uses the 539 variable field (Data Elements of Reproduction) instead of field 533 subfield 7. If you place the cursor in the 539 field and then click **RDA Toolkit**, the RDA description for field 533 opens instead.
3	When finished, click **X** in the upper right corner, or press <Alt><F4> to close the RDA Toolkit browser screen.

Print information in Help	**Warning:** Hidden text in topics does not print or copy to the clipboard unless you click Expand all on the topic toolbar to display any hidden content.

Print a single topic

Action
In the topic toolbar, click the **Expand all** button, and then click **Print** button.

Print all topics under a book heading ( )

	Action
1	In the Help Contents tab, right-click a heading containing the topics you want to print, and in the popup shortcut menu, click **Print**.
2	In the Print Topics window, select **Print the selected heading and all subtopics**, and then click **OK**.
3	In the Print window, click **Print**. **Caution:** Expandable hidden text in the Help topics does not print. There is no way to expand all text in multiple Help topics.

Print selected text

	Action
1	In the topic toolbar, click the **Expand all** button, if there are drop-down text links in the text you want to print. Then select the text.
2	Right-click anywhere in the selection, and on the shortcut menu click **Print**. Or Press <Ctrl><P>.
3	In the Print window, click the **Selection** button under **Page Range**, and then click **Print**.

Copy and paste information from Help	

	Action
1	In the topic toolbar, click the **Expand all** button, if there are drop-down text links in the text you want to print. Then select the text.
2	Right-click anywhere in the selection, and on the shortcut menu click **Copy**. Or Press <Ctrl><C>. You can then paste the text in a document using <Ctrl><V>.

Keystroke shortcuts for navigating in Help

You can use the following keystrokes to open or close Help or to navigate in Help when Help is the active window:

Press these keys...	To do this ...
<F1>	Open Help
<Alt><F4>	Close Help
<F6>	Toggle between navigation pane (on the left) and topic pane (on the right)
<Up arrow> and <Down arrow>	Scroll
<Enter>, <Return>, or <Right arrow>	Open a book (>)
<Enter>, <Return>, or <Left arrow>	Close a book (>)
<Tab> or <Shift><Tab> (to highlight link)	Move from one hot link to another in a topic
<Enter> or <Return> (on a highlighted link)	Open links
<Tab> or <Shift><Tab> to highlight; then <Enter> or <Return>	Show or hide expanding or drop-down text links
<Ctrl><Tab>	Move among tabs
<F5>	Close a secondary screen
<Alt><Left arrow>	Go to the last screen opened
<Alt><Right arrow>	Reverse latest action
<Ctrl><P>	Print a topic
<Windows key><M>	Minimize all windows, including Help

2   Get support

Connexion service hours

OCLC Connexion is available 24 hours, Monday through Sunday.

Note: OCLC occasionally conducts maintenance on the system, most usually on Sundays from 2 am to 6 am U.S. Eastern Time. OCLC usually provides advance notice about these maintenance periods via listserv messages and on the system alerts Web page (http://www.oclc.org/support/systemalerts/default.asp or access from within the client).

Check system alerts, known problems, or system news

To check the system alerts page for conditions affecting system performance or to check client known problems:

Action
On the Help menu, click **Useful Web Links** and then click: **OCLC System Alerts** (or press <Alt><H><U><L>). Or **Client Known Problems** (or press <Alt><H><U><K>).

To search OCLC system news for the latest information about a product or service:

Action
On the View menu, click **News**, or press <Ctrl><F5>. In the Search Online News window construct a search: ● Type a search term ● Leave search criteria blank to retrieve all news items ● Select a service category, such as Cataloging For a detailed procedure, see "View OCLC system news" below.

Contact OCLC customer support staff

From within the client, open an e-mail support form to contact OCLC customer support or one or more other support sources you specify:

	Action
1	On the Help menu, click **Contact Support**, or press <Alt><H><C>.
2	In the Contact Support form window, select the type of message you want to send: ● Suggestion/Enhancement (**default**) ● Problem/Question **Optional.** If you select **Problem/Question**, check the Connexion client problems and troubleshooting Web page before sending your support request: Under **Having problems? Have you checked**, click **Problems and Troubleshooting**. **Alternative:** Open the client known problems Web page from **Help > Useful Links > Client Known Problems**.

	Action

3	Select a recipient for the message.
	• OCLC Support
	  Message goes to *connexion-support@oclc.org*
	• E-Mail Address
	  Enter any e-mail address; to send the message to more than one recipient, separate the e-mail addresses with semicolons

4	**Required.** Enter your information: • Name • Telephone • E-Mail Address **Notes:** • The system automatically supplies your name and e-mail address if you already entered them in the Report Error window (**Action > Report Error**, which is available when you have a bibliographic or authority record open). • Once you have entered your information, the client automatically supplies it the next time you open the window.
5	**Required.** In the text box, type your message.
6	Select **Yes** or **No** to indicate whether you: • Give permission for support staff to contact you (**default**: Yes) • Want a copy of the message (**default**: No) (if you select this option, the client sends a copy to your e-mail address)
7	When you are finished, click **Send** or click **Cancel**.

Contact support staff by telephone or fax

Hours for OCLC technical support are 7:00 am to 9:00 pm U.S. Eastern Time, Monday through Friday. Telephone and fax numbers are:

- USA 1-800-848-5800

- International: 1-614-793-8682

- Fax: 1-614-764-2694

Please provide the following information:

- Service or program you are using

- Your OCLC symbol

- Your OCLC authorization number and password

Open client Help or documentation on the Web

Action
On the Help menu, click **Client Help**, or click ![icon], or press <F1>. Use the Contents, Index, or Search (full-text) tab to locate information you need. Or In any client window, click Help or press <F1> for a context-sensitive topic with details about the window and how to use it. See details in the previous section.

Note: All information contained in client Help is also available in client "system guides" on the Web in both HTML and PDF formats. The guides are organized roughly the same as in the client Help Contents tab.

To open client documentation on the Web from within the client:

	Action
1	On the Help menu, click **Useful Links > Client Documentation**, or press <Alt><H><U><D>. **Result:** Your default Web browser opens to the client documentation Web page.
2	Click **Authorities**, **Basics**, **Cataloging**, or **Getting started**. Then click a title link to open the HTML version of a document, or click the **pdf** link for a title to open the PDF version.

Also on the client documentation Web pages only (not in Help), the following additional client documents are available:

- Function Key Template (http://www.oclc.org/support/documentation/connexion/client/gettingstarted/ keyboardtemplate.pdf)

- Setup Worksheet for OCLC Connexion Client (http://www.oclc.org/support/documentation/connexion/client/gettingstarted/ setup.pdf)

Get more information from the OCLC Web site

Use the Help menu/Useful Links submenu to:

- Open the Connexion home page or Connexion client documentation page

- Open client known problems or tips, WorldCat statistics, or OCLC system alerts

- Download products and services

- Report errors in WorldCat or LC authority file records or report duplicates in WorldCat

Action
On the Help menu, click **Useful Links**, or press <Alt><H><U>, and click a link on the submenu. See details below.

Open client tutorials from the Help menu

To open tutorials that take you step by step through many of the main client functions:

	Action
1	On the Help menu, click **Tutorial**, or press <Alt><H><T>. **Note:** Check system requirements for using the client Web-based tutorials at the end of the tutorials Web page.
2	Select a tutorial you want to open, and click **View this tutorial**.

3   Link directly to OCLC Web services and information

Open Web services directly from the client Help menu

To save time, open cataloging- or Connexion client-related services and information on the OCLC Web site directly from the client:

Action
On the Help menu, click **Useful Web Links** or press <Alt><H><U>, and then click one of the links listed in the table below. **Results:** • Web pages open in your default browser. • If the Web page requires logon, the client automatically logs you on.

The following table describes the service or information available via each Useful Links submenu command:

Link	Opens default browser to ...
OCLC Connexion	Connexion home page
Client Documentation	Connexion client documentation page • Links to categories of system guides containing comprehensive client documentation • Content of the guides is also published as online Help within the client (**Help > Client Help**)
Bibliographic Formats and Standards	*OCLC Bibliographic Formats and Standards* Opens the main page of *Bibliographic Formats* with links to chapters and field descriptions. Use this link to browse Bibliographic Formats. Use MARC field Help (Help menu) to open a specific description for a current field in a displayed record (see instructions in section 1 above).
OCLC Classify Web Service	Opens the prototype OCLC Classify Web service independently of the client. Note: See details about using the Classify service within the client via **Edit > Classify** to automatically insert a classification number in a displayed bibliographic record in Cataloging, Edit Bibliographic Records, section 1.
Connexion Known Problems	Connexion client problems and troubleshooting page Lists current problems and workarounds, if any, and recently resolved problems
WorldCat Statistics	WorldCat facts and statistics page • Gives statistics such as number of records in WorldCat and number of participating libraries • Links to other statistics such as language distribution and number of records by encoding level

Link	Opens default browser to ...
WorldCat Record Change Request	Request form Send a requested change to a WorldCat bibliographic record
WorldCat Record Merge Request	Request form Send a request to merge duplicate WorldCat records
Authority Record Change Request	Request form Send a requested change to an authority record in the LC names and subjects authority file
OCLC System Alerts	System alerts page • Check for information about any known OCLC system problems if you have difficulties logging onor using the system • If none are listed, contact support about your problem
Access and Authorization form	OCLC access and authorization form Use form to add, change, or delete authorizations for access to the OCLC system for the following services: • Cataloging • Interlibrary loan

Notes:

- Get statistics on your use of OCLC cataloging and other services (**View > OCLC Usage Statistics)**. See next section for instructions.

- Open Connexion client tutorials on the OCLC Web site (**Help > Tutorial**).

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

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

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

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

Action
Click **Tools > Find in a Library** or press <Alt><T><F>.

Result: Your default browser opens to the Find in a Library view of the record.

Open a local holdings maintenance session	Open and maintain LHRs for bibliographic records displayed in the client (**Tools > Launch Local Holdings Maintenance**).

The client opens the Connexion browser, logs you on, and displays the local holdings record(s) (LHRs) or a list of LHRs attached to the bibliographic record currently open in the client.

Automatic logon uses the general default authorization and password you assigned in **Tools > Options > Authorizations** or the specific authorization you assigned to a local file in **File > Local File Manager / Authorization**.

See procedure in Basics, Set Up Communications and Log On, "Launch OCLC cataloging-related services from Connexion client." |
| **Open a WebDewey-only session from the client** | If you subscribe to WebDewey, you can open a WebDewey-only session directly from the client (**Tools > Launch WebDewey**).

The client automatically logs you on using the default authorization and password you set up for interactive logon (**Tools > Options > Authorizations**).

Your default authorization for interactive logon must be associated with a WebDewey subscription.

See procedure in Basics, Set Up Communications and Log On, "Launch OCLC cataloging-related services from Connexion client." |

4   Launch OCLC cataloging-related services from Connexion client

Launch a WebDewey session

If you subscribe to WebDewey services, you can log on to a WebDewey session from within the client for using the electronic version of the Dewey Decimal Classification (DDC) system:

	Action
1	Click **Tools >Launch WebDewey**, or press <Alt><T><W>. **Results:** • The client logs you on automatically and opens a WebDewey session in your browser. • The logon uses the default authorization and password you set up in the client in **Tools > Options > Authorizations**. Your default authorization must be associated with a WebDewey subscription. • Connexion client remains open. **Note:** This is the equivalent of logging on to WebDewey directly in a browser window using the URL: http://dewey.org/webdewey/login/login.html.
2	When finished, click the **X** in the upper right corner of the browser screen to log off the WebDewey session automatically.

For information about using WebDewey, see WebDewey documentation at: http://www.oclc.org/support/documentation/dewey/default.htm

Launch local holdings maintenance in the Connexion browser

If you have at least a Full-level cataloging authorization, you can create and maintain local holdings records for items your library holds to make your holdings accessible through WorldCat.

To check whether a local holdings record exists for a record, see the holdings statement in the information area at the top of the record.

Example: *Held by OCL/Local OCL holdings - 12 other holdings*

Local holdings maintenance is provided in the Connexion browser. To open the browser and work with LHRs from within the client:

	Action
1	With an existing WorldCat or online or local bibliographic save file record open in the client, logged on or offline, on the Tools menu, click **Launch Local Holdings Maintenance,** or press <Alt><T><L>. **Results:** • The client logs you on automatically to the Connexion browser, opens your default browser, and displays your LHR attached to the bibliographic record or, if you have multiple LHRs attached, a local holdings summary list. • The logon uses the default authorization and password you set up in the client in **Tools > Options > Authorizations**. Or If a local save file record is displayed and you assigned a local-file-specific authorization in **File > Local File Manager/Authorization**, the logon uses the authorization assigned to that local file. • Connexion client remains open.

	Action
2	Modify the local holdings record(s), or use other functions of the service.
3	When finished, click the **X** in the upper right corner of the browser screen to close the screen and log off the local holdings maintenance session automatically.

See Local Holdings Maintenance documentation for comprehensive information on using the local holdings maintenance service:
http://www.oclc.org/support/documentation/localholdings/default.htm

5 View your OCLC usage statistics

To view statistics about your library's use of OCLC cataloging (and other) services:

	Action
1	Click **View > OCLC Usage Statistics**, or press <Alt><V><C>. **Results:** • The client logs you on automatically using the default authorization and password you set up in the client in **Tools > Options > Authorizations**. • The OCLC Usage Statistics screen • for your library opens with the Online Cataloging category pre-selected. The Connexion client remains open.
2	Click a category of statistics to view. Depending on sources of your library cataloging activities, categories may include one or more of the following: **All Activity**, **Institution:** [symbol], **Network** [name], **Group**, **Group: Subgroup**, **Authorization:** [your logon authorization]
3	Select a **Monthly**, **Daily**, or **Monthly Consolidated** usage report.
4	Select a cataloging interface: **All interfaces** or **By Interface:** [name of cataloging interface]. **Note:** Only cataloging interfaces your library used during the reporting period are listed. Interfaces for which statistics are available are Connexion client and browser and Z39.50 cataloging. A statistics report opens showing general categories of activities and record types.
5	Click a line item in the statistics list to see detailed statistics for that category. For example, click **WorldCat Exports,** or click **WorldCat Record Actions**. Or Click **View All Commands** at the top to view comprehensive statistics for each command for each record type individually.
6	**Optional.** Change criteria for viewing statistics. In the box at the top of the screen: • Change the reporting period: Select a beginning month and year in the **Period** list, and then enter the number of months to include in the **Months** box. • Enter a different OCLC symbol in the **Institution** box if your institution has more than one. • Enter a different authorization in the **Autho** box if your library uses more than one. • When finished, click **Update** to change the criteria.
7	**Optional.** Download the displayed report: • Click **Export**. The data is downloaded to an Excel worksheet, which you can print and/or save.

8	**Optional.** E-mail the displayed report or to set up a periodic e-mail of the report with updated statistics:
	 • Click **E-mail**.
	 • Enter your e-mail address, select **HTML** or **Excel** format, select **Attachment** or **Hyperlink to report**, and then:
	   — Click **Send now**.
	      Or
	      Select the check box to **Send Monthly**, and then click **Save**.

Note: OCLC usage statistics are also available for FirstSearch, WorldCat.org, Resource Sharing, COUNTER, Digital Collections, and WebDewey, if you use them.

6   View OCLC system news

What information is in system news?

- General news and announcements for users of all OCLC services, including OCLC Cataloging services

- System updates, including information about enhancements to OCLC Connexion

Search system news

	Action
1	On the View menu, click **News**, or click , or press <Ctrl><F5>. If you are not logged on, the Logon OCLC Connexion window opens. You must log on to view system news (see Getting Started, "Set up communications and log on" for more information).

2	In the **Search for** box of the Search Online News window, type a search.
	Guidelines:
	- Type a word or phrase. Spaces between words are treated as **AND** operators. You can also combine terms with **OR** and or exclude terms with **NOT**.
	- You can use truncation to expand a term to include variant endings. Or use truncation when you know only the first part of a term. Type the first characters of the term (include as many characters as you know); then type an asterisk (*).
	  Examples: search*, **digi***, **edit***
	- Use character masking (wildcards) to expand a term to include variant spellings or when you are unsure of the correct spelling for part of a term. Type a question mark (?) or a number sign (#) in place of the character(s) you want to mask.
	  — Use the question mark to retrieve variants of 0 or more characters.
	    Examples:
	    col?r retrieves **color** or **colour**
	    int?net retrieves **internet** or intranet
	  — Use the number sign to retrieve variants of exactly 1 character.
	    Example: wom#n retrieves both **woman** and **women**
	Or
	Leave all search criteria blank to view all system news items.
	Or
	Select from among your previous 10 searches in the **Search for** list

3	Select an index: Title or Message. **Default:** Title

	Action
4	Optional. Select one of the following service categories: • Authorities • Cataloging • CatExpress • Digital Archive • Dublin Core • General • Pathfinders • System Updates • WebDewey **Default:** blank Or Leave other search criteria blank and select a category only to retrieve all news items in that category.
5	Optional. To enter diacritics in a search term, click **Enter Diacritics**. See Cataloging: Edit Bibliographic Records, "Insert diacritics and special characters" for more information.
6	Optional. To keep the search, click the **Retain Search** check box. The client retains the search the next time you open the Search Online News window.
7	Click **OK**, or press <Enter> to do the search. Or Click **Cancel** to cancel the search and close the window. Or Click **Clear Search** to cancel the search and leave the window open.

Search indexes

Index	Included Fields	Example	Use to ...
Title	Words in the titles of news items	**connexion**	• Find a news item when you know the title or part of the title • Determine whether a term is part of the title of a current news item
Message	Words in the content of the news items	**cutter***	• Find occurrences of term(s) for the topic you want in the content of a news item

How search results display

Number of Items Found	Display
No news items	• System message asking you to change or simplify your search and try again
One news item	• Full news item

Number of Items Found	Display
Up to 100 news items	• System message showing the number of records found • A list of all found items showing title and service category, sorted by start date
101 or more news items	• A message that tells you: — The total number of records found — That the displayed list contains the first 100 records — How to view the next 100 (**View > Next 100 Records**) • A list of titles for the first 100 records. The entire list is sorted by start date, even though you see only 100 entries at a time

Search results list

The OCLC News List has three columns:

- Title

- Service category

- Start date (default sort order)

Resize columns

Action
Move the cursor over the right-hand border of the heading for the column you want to resize until the cursor becomes ↔ . Then click and hold while you drag the border to a new position. To restore column widths to the default, right-click anywhere in the list. On the popup menu, click **Reset List Sizes**. **Result:** In the confirmation message, click **OK** to confirm, or click **Cancel** to keep the column widths as they are. When you reopen a list of this type, the original column widths are restored.

Re-sort the list

Action
Click a column heading to sort by category, date, or title. Or On the View menu, click **Sort By > Category**, or **Date**, or **Title**, or press <Alt><V><S><R>, .<Alt><V><S><E>, or <Alt><V><S><T>, respectively. **Default:** Start date **Note:** For lists of more than 100 records, sorting applies only to the 100 records currently displayed. If you display another set of 100 records, you must re-sort the list.

View a list of more than 100 records

The client shows only 100 records at a time when results exceed that number. To display other sets of 100 in the list:

Action
To view the next 100 records, on the View menu, click **Next 100 Records**, or press <Ctrl><Alt><Shift><X>, or press <Page down>. Or To view the previous 100 records, on the View menu, click **Previous 100 Records**, or press <Ctrl><Alt><Shift><U>, or press <Page up>. **Tip:** Check the status bar to see where you are in the list of total records found. For any record selected on the list or opened for display, the status bar shows the record number of the **total** number of records found (for example 23 of 152).

Print a list

	Action
1	With an OCLC News List open, on the File menu, click **Print List**, or press <Shift><F12>.
2	In the Print window, click **OK** or press <Enter>. **Note:** If results exceed 100 records, the client prints only the set of currently displayed records. You must display other sets in the list to print them.

For general information on using lists in Connexion client, see Basics, Use Client Interface, "Record lists."

Open a news item on a list

Action
In an OCLC News List, double-click the entry, or select the entry and press <Enter>. The news item opens in the OCLC System News window.

Print a news item

Action
With a news item open, in the OCLC System News window, click Print, or click , or press <Ctrl><P>.

Hide or change the order of columns in a news list

To hide columns or change the order of columns in the News List:

	Action
1	Right-click anywhere in a list, and on the pop-up menu, click **List Settings**.
2	**To hide a column**: In the Column Settings window, select a column by its name and click **Hide**. Or Double-click a column to clear the check box next to its name. **To display a hidden column:** In the Column Settings window, select the column and click **Show**. Or Double-click to select the check box next to the column name. A check mark indicates that the column displays. **Default:** All columns are selected.

3	To change the order of columns:
	
	Select each column you want to move, one by one, and click **Move Up** or **Move Down** until it is in the position you want.
	
	See the default order of columns above.
	
	Or use the mouse to change order of columns. You do not have to use the Column Settings command in the right-click menu to change the order of columns. Instead:
	1. Place the cursor over the column heading of the column you want to move.
	2. Hold down <Ctrl>, left-click and drag the column heading.
	  Or
	  Right-click, hold and drag the column heading.
	  While you drag, the cursor becomes a rectangle.
	3. Drop the rectangle on top of the border between two columns where you want to place the column you are dragging.

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

7   Find user information for troubleshooting

Types of information   If you need to work with technical support staff, you may be asked for information about your version of Connexion client software, your workstation, the current or most recent online session, your client settings, and other factors that may affect how the client works.

Also, the client has built-in options for gathering information about system responses (**Tools > Options Access**). See the last section of this topic for details.

Client software version   To get information about the client (for example, the version number):

	Action
1	On the Help menu, click **About OCLC Connexion Client**, or press <Alt><H><A>. The About OCLC Connexion dialog has two tab pages. Click a tab to view its information: • The General tab shows information about the workstation and your version of the client — OCLC Connexion client version number — Software copyright information — Executable: Location of the file that starts the client — O/S: Your operating system — System Path: Location of your operating system files — Settings Path: Location of the files containing your client settings — CRL Version: Version of Microsoft .NET Framework, a component automatically installed with the Connexion client, if not already on your machine. Required for running the client — CRL Path: Location of .NET Framework — Created: Date and time you installed the Connexion client — Memory: Amount of memory used by the client (bytes) — Install Drive: Amount of free space in the drive where you have the client installed (bytes) — CPU: Information about your processor — Resolution: Your monitor resolution setting as shown in Start/Settings/ Control Panel/Display/Settings tab • The Loaded Modules tab gives basic information about program modules loaded with the client — Type: Type of file (for example, EXE, DLL) — Module: Full file name — Name: Name (description) of module — Version: Version number of module — Path: Full path and file name
2	To print the information on both tabs, click **Print**. Or Click **Print to File** to print the information on both tabs to a text file which you can attach to an e-mail. The client prints to **systeminfo.txt** in the client program folder: **X:\Program Files\OCLC\Connexion\Program\systeminfo.txt** (where **X** is the letter of your hard drive)

Workstation

If you need additional information about your workstation:

Action
On the Windows Start menu, click **Settings > Control Panel > System**. The tabs in the Windows **System Properties** dialog contain information about the properties of your operating system.

Recent online session, cataloging profile, and designated default local files

Action
On the View menu, click **User Information**, or press <Alt><V><U>. In the User Information dialog, the current or most recent online session number is at the top. The dialog also includes other session information, such as the time and duration. The client keeps the information from your most current session only.

Quick access button to open client files and logs

Instead of using Windows Explorer to navigate through folders to access client files and logs, open with a single click from within the client:

	Action
1	On the View menu, click **User Information**, or press <Alt><V><U>.
2	Click **Paths and Logs**.
3	In the **User Information: Paths and Logs** window: • Under **Installation Directory**, click **Go** to open the client installation folder (contains **Connex.exe** file and other system files). • Under **Application Data Directory**, click **Go** to open the client application folder (contains your data files). • Under **Current Profile Path**, click **Go** to open your default user profile folder (contains your options and settings). • Click **View Host Response Log** to open your **HostResponse.log** file (a text file that opens in Notepad). The file can help OCLC support staff evaluate system responses. • Click **View Local File Errors Log** to open your **LocalFileErrors.log** file (a text file that opens in Notepad). The client creates this file only if a fatal local file error occurs. The file has information that can help troubleshoot the error. For more details about client file locations and contents, see OCLC Getting Started with Connexion Client, "User files (back up or share) and system files."

Client settings

To view most client settings:

Action
On the Tools menu, click **Options**, or press <Alt><T><O>, and click any tab.

For more information, see Basics, Set Options and Customize, "Set client options and customize."

System response tracking

The Access tab (**Tools > Options > Access**) contains check boxes for selecting or clearing options to collect response times and/or exact requests and responses during interactions with the OCLC system.

- **Enable statistics logging option.** Allows the client to log response times between your workstation and the OCLC system, if responses reach a certain (variable) length of time. **Default:** Check box selected.

- **Enable transaction logging option.** Allows the client to log exact requests and responses between your workstation and the OCLC system when you interact with the system. **Default:** Check box cleared.

Collecting this information can assist OCLC staff to evaluate system performance, if needed.

OCLC highly recommends keeping the default settings for these two options, unless advised otherwise by Connexion support staff for problem solving. Changing the settings may affect system response time.

Any statistics and/or transactions logged are stored in **X:\Documents and Settings\[**_user name_**]\Application Data\OCLC\Connex\HostResponse.log**.