

Automation and Customization Quick Reference

Menu Commands in Connexion Client

On the Menu Bar



Constant Data Create constant data from a workflow

- **Cataloging>Create>Constant Data**
 - Choose workflow type (books, visual materials, etc.)
 - Enter tags, fields, text, following regular editing procedures
 - **Action>Save Record to Local File OR Action>Save Record to Online File**
 - Name the Constant Data (tip: use a short name for easy applying)
 - (optional) Set a “my status” and set as default

Create constant data from a bibliographic record

- Open a record
- **Edit>Derive>New Constant Data**
- Choose **Yes** or **No** for Transfer fixed field values to new record?
- Enter tags, fields, text as needed
- **Action>Save Record to Local File OR Action>Save Record to Online File**
- Name the Constant Data (tip: use a short name for easy applying)
- (optional) Set a “my status” and set as default

Apply constant data

- Open target record

THEN

- **Edit>Constant Data>Local>Apply Default**
 - Default must be designated beforehand

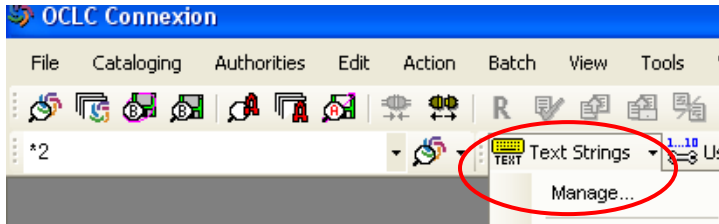
OR

- **Edit>Constant Data>Local>Apply by Name**
 - Type name of saved constant data record
 - Choose fixed, variable, or both

OR

- **Edit>Constant Data>Local>Apply from list**
 - Search dialog (leave blank to see all constant data)
 - Click desired constant data in list
 - Choose fixed, variable, or both
 - Click **Apply Selected**

Text Strings



Create Text String

- **Text Strings > Manage**
 - **Add**
 - In Description, type a name
 - In Text, type text string exactly as you want it applied (optional: can include tags (including 006 and 007), indicators, delimiters, subfield codes; multiple fields)
 - **OK**

Apply Text String

- **Text Strings >** select from list
- OR map to a custom keystroke

Keystroke Shortcuts

Assign Keystroke Shortcuts

- **Tools>Keymaps**
- Make a selection in the **Display Commands For Category** box
- Choose item to associate with the keystroke shortcut (in the white box on the left)
- Place cursor in **Press New Shortcut Key** box
- Press desired shortcut key combination
- If satisfied, click **Assign**

View a list of Keystroke Shortcuts

- To view a list of user-defined shortcut keys only: **Tools>Keymaps>List All**
- To view a list of all shortcut keys (Application default, Windows default, and user-defined): **View>Assigned Keys...**
 - **Copy to Clipboard** (to edit list in a word processor)
 - **Print**

Macros

Use existing macros

- Existing OCLC-supplied macros are in the OCLC macro book (**Tools>Macros>Manage...**)
- To apply, map a macro to a custom keystroke shortcut or a User Tool

Create a new macro book

- **Tools>Macros>Manage...**
- **New Book**
- Name the book
- **Close**

Note: Creating a new book will keep you from losing custom macros when you upgrade Connexion.

Record a new macro

- Prepare macro scenario (open record, etc.)
- **Tools>Macros>Manage...**
- Click on macro book where you want to save macro
- Click **Record**
 - Enter Macro Name (no spaces allowed)
 - Enter Macro Description
 - **OK**
- Complete steps to be recorded in macro
- Press stop button (red square)

Resources for writing or editing macros

Connexion client macros page

https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_documentation

Includes:

Updated OCLC macro book

Macros supplied by Connexion client users

Macro lessons

OCLC-CAT

- OCLC-CAT is an electronic discussion list for any topic related to cataloging with OCLC
- To subscribe: <http://www.oclc.org/en/email.html>

User Tools

Assign User Tools

- **User Tools>Manage**
- Make a selection in the **Display Commands For Category** box
- Choose item to associate with the User Tools (in the white box on the left)
- Under Select New User Tool, select Tool 1-10
- If satisfied, click **Assign**

Apply User Tools

- **User Tools>**click assigned tool

Toolbar Editor

- **Tools>Toolbar Editor**
- Add a button to the toolbar: Drag and drop a toolbar button in the **Menu Items** list to the toolbar
- Remove a button from the toolbar: Drag and drop a toolbar button from the toolbar to the **Menu Items** list
- Move a button: Press and hold the <Alt> key while you drag and drop a button in the toolbar to a new location

RDA Toolkit

To use the RDA Toolkit, you must be a subscriber.

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

One-time setup

- **Tools>Options>RDA**
- Click the check box next to **Enable the RDA Toolkit**
- To use IP authentication: check the box
- To log in with user name and password: Un-check “Use IP authentication” and enter your subscriber user name and password
- **Close**

Open RDA Toolkit field description

- Place cursor in variable field of bibliographic or authority record or workform
- **Tools>RDA Toolkit**
OR Right-click in a field, and on the shortcut menu click **RDA Toolkit**

Selected Default Keystroke Shortcuts in Connexion Client

Constant Data

Create New Constant Data	<Ctrl><Shift><N>
Apply Default Local Constant Data	<Ctrl><Y>
Apply Local Constant Data by Name	<Ctrl>
Search Local Constant Data	<Ctrl><L>
Apply Default Online Constant Data	<Ctrl><A>
Apply Online Constant Data by Name	<Ctrl><U>
Search Online Constant Data	<Ctrl><N>

RDA Toolkit

Link to RDA Toolkit	<Alt><T><D>
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Documentation

Connexion Client Cataloging Quick Reference

Instructions for most cataloging functions in the client. Includes default keystroke shortcuts and toolbar buttons.

<https://oc.lc/connexion-client-quick-ref>

Cataloging: Use bibliographic constant data

Create and apply online and local constant data records to insert often used content in records.

<https://oc.lc/connexion-client-use-bib-constant-data>