

# Getting Started in OCLC Connexion:

## *Special Collections Workform*

### Accessing Connexion

1. Open Connexion application



2. On toolbar at top, click **Mix** button (for “Mixed Materials Workform”), or **Books** button to access workform template




3. After Connexion workform opens, apply default constant data by using ctrl-y (This inserts common fields normally used for archival records). OR, click one of these “constant data” buttons to choose from a list of template:



4. Move through workform by using usual mouse/word processing commands. In addition, you may use these keyboard shortcuts:

shift – enter	Insert new field ABOVE
alt – up arrow	Move field UP one position
alt – down arrow	Move field DOWN one position
shift – tab	Move cursor to previous cell
alt – delete	Delete entire field
ctrl – home	Move cursor to beginning of record
ctrl – end	Move cursor to end of record
ctrl – Z	Undo edits one at a time in cell containing cursor
ctrl – shift – Z	Cancel all edits since last time you saved record
ctrl – F7	Delete text from cursor to end of current cell
alt – F7	Delete word where cursor is located
ctrl – S	Move cursor: (1) from beginning of field to 1st subfield; (2) to next subfield; (3) to beginning of next field (if at end of field)
shift – ctrl – S	Move cursor to previous subfield or, if at beginning of field, to end of previous field

5. To add subfield delimiter , use ctrl-d (or create a keyboard command: *tools/keymaps/character*)

## Saving/Retrieving Records

1. When finished with record:

- a. Click **Action Save Record to local file** button [or F4] (saves on computer only)



OR:

- b. Click **Action Save Record to online save file** button [or ctrl-alt-v] (saves on OCLC so reviewer can check at another computer)



2. To find a record you've saved in local file (on your computer)

- a. Click **Cataloging search bib local file** button [or F3]



- b. In next window, search for specific record. Or, to see entire list of saved items, click **OK** button at bottom of window

A screenshot of a dialog box titled "Search Local Bibliographic Save File". It contains a "Local File:" label followed by a text box containing the path "C:\Documents and Settings\jjenkins\Application Data\OCLC". Below this is the instruction "Search for all records by not specifying any criteria." and a "Search for:" label followed by an empty text box.

3. To find a record you've saved in online save file:



- a. Click **Cataloging search online safe file** button [or ctrl-F3]



- b. In next window, search for specific record. Or, to see entire list of saved items, click **OK** button at bottom of window

A screenshot of a dialog box titled "Search Online Bibliographic Save File". It contains the instruction "Search for all records by not specifying any criteria." and a "Search for:" label followed by an empty text box.

## Adding Original Records to OCLC

1. From local file in Connexion, select record you want to import
2. Click **Validate** button to see if record has errors  

3. Click **Action update holdings** button  

4. A window pops up asking you to log on
5. Record will immediately be added to OCLC and will be given an OCLC number. If there are errors in the record, you will see an error report. (If so, fix errors and try again)

## Transferring Records from Connexion to Millennium

1. Go to the Connexion record to want to transfer into Millennium
2. Click **Export** button or use **F5** key
3. Bib record is automatically exported to Millennium
4. Search for record in Millennium
5. Double-check record and validate
6. Import LC authorities if necessary
7. Add statistics field 964 (Special Collections original record) by using **macro**
8. Save record