

If you have questions about any of the instructions below, please contact the Minitex Digitization, Cataloging & Metadata Education Unit (612-624-4002, 800-462-5348 or [mino@umn.edu](mailto:mino@umn.edu)).

The Connexion Client allows you to export records to a file or directly to a local system. You can export records one at a time or as a group, in MARC format or Dublin Core. You can also export authority records in MARC format.

If your site uses a firewall to isolate internal systems from the Internet, you must provide a port that allows OCLC Connexion to access your local system through the firewall. Your site's firewall system must recognize and accept export data sent by the server from any numeric IP address within the following address range: 132.174.2.0/24 (all numeric addresses from 132.174.2.1 through 132.174.2.253).

### **Exporting using a TCP/IP Connection**

#### **To configure Export settings:**

The Connexion Client comes with two default options noted in the Export destination section: "None" and "File:[Prompt for file name]." Follow the directions below to define a TCP/IP export destination as your default.

- 1) From the Tools menu, choose Options and click the Export tab.
- 2) Click the Create button in the right hand side of the export window.
- 3) The New Export Destination window has 4 choices: File, LPT Port, Connection, and OCLC Gateway Export. To export into MnPALS' Aleph, choose **Connection** and click OK.
- 4) In the Export Connection Settings window, leave all the boxes blank or with the default value supplied. Click the Create button.
- 5) In the New Communication Connection box, choose **TCP/IP (internet)** and click OK.
- 6) In the TCP/IP Settings box, enter the host name and port number given to you by your system administrator and click OK.
- 7) In the Communication Connection Name box, accept the default destination name supplied or give your destination a unique name. Click OK.
- 8) Your named destination will now be highlighted in the Communication Connection box with the prefix "TCP/IP:". Click OK.
- 9) In the Export Connection Settings box, double-click on your highlighted destination name.
- 10) In the Export Destination Name box, your destination will now have the prefix "Connection:" added. Click OK.

- 11) Note that your new Export Destination is now highlighted in the Select an Export Destination box. This will be the destination for the exported records each time you issue the Export command or run a batch of exports.

#### Export Instructions:

You will need to configure settings to indicate your preference for exporting records individually or in groups.

- 1) To Export a single bibliographic record:
  - a. Configure your settings:
    - i. From the Tools menu, choose Options and click on the Batch tab
    - ii. In the Record Actions area, under Perform Record Actions in Batch, verify that **Bibliographic Record Export** and/or **Authority Record Export** are NOT checked. Click **OK** to close the box. The Client will save these settings until you change them.
  - b. Retrieve the record you want to export, or highlight it on the list in your local or online save file.
  - c. Press <F5>, OR, from the Action menu, choose **Export**, OR, use the "ActionExport" toolbar button. Because you are configured to export via a TCP/IP connection, the system exports the record immediately. You do not need to take further action. The system changes the record's Export status to **C** (Completed) or **F** (Failed) in the Action Status line at the bottom of the record and in the appropriate column on the save file display. If the export failed, fix any errors and try again.
- 2) To Export records in a batch:
  - a. Since records export immediately whether you are logged on or offline, you must select an option that tells the Client to export in Batch mode. From the Tools menu, choose Options, and then click the **Batch** tab.
  - b. In the Record Actions area, under Perform local actions in batch, check **Bibliographic Record Export** and/or the **Authority Record Export**. Click **OK**. The Client will save these settings until you change them.
  - c. Display a bibliographic record from a local file that you want to export or select records from a local bib file list.
  - d. From the Action menu, choose **Export**. The record(s) are marked for export in batch mode. The export status is changed to **R** (Ready).
  - e. When ready, run batch processing.

## Exporting using a Gateway Connexion

Gateway export is most frequently required when a local system gives or expects a response to each record being loaded. An example of such a system is III's Millenium system.

### To configure Export settings:

The Connexion Client comes with two default options noted in the Export destination section: "None" and "File:[Prompt for file name]." Neither of these options is appropriate for use with a system requiring Gateway export, so follow the directions below to define a Gateway export destination as your default.

- 12) From the Tools menu, choose Options and click the Export tab.
- 13) Click the Create button in the right hand side of the export window.
- 14) The New Export Destination window has 4 choices: File, LPT Port, Connection, and OCLC Gateway Export. Choose **OCLC Gateway Export** and click OK.
- 15) In the OCLC Gateway Export - Local System Settings box, enter the host name and port number given to you by your system administrator and click OK. Leave all the other settings with the default values or change the defaults as recommended by your system administrator.
- 16) In the Export Destination Name box, your destination will now have the prefix "Gateway Export:" added. Click OK.
- 17) Note that your new Export Destination is now highlighted in the Select an Export Destination box. This will be the destination for the exported records each time you issue the Export command or run a batch of exports.

### Export Instructions:

Typically, one decides to export records either one-by-one, or in groups, so the instructions below include configuring the settings for each option.

1. To Export a single bibliographic record:
  - a) Configure your settings (you will only need to do this once, or when you switch back and forth between the one-by-one and batch options):
  - b) From the Tools menu, choose Options and click on the Batch tab
  - c) In the Record Actions area, under Perform Record Actions in Batch, verify that **Bibliographic Record Export** and/or **Authority Record Export** are NOT checked. Click **OK** to close the box. The Client will save these settings until you change them.
  - d) Retrieve the record you want to export, or highlight it on the list in your local or online save file.
  - e) Press <F5>, OR, from the Action menu, choose **Export**, OR, use the "ActionExport" toolbar button. Because you are configured to export records one-by-one, the system exports the record immediately. You do not need to take further action. The system changes the record's Export status to **C** (Completed) or **F** (Failed) in the Action Status line at the bottom of the record and in the appropriate column on the save file display. If the export failed, fix any errors and try again.

2. To Export records in a batch:
  - a) Since records export immediately whether you are logged on or offline, you must select an option that tells the Client to export in Batch mode. From the Tools menu, choose Options, and then click the **Batch** tab.
  - b) In the Record Actions area, under Perform local actions in batch, check **Bibliographic Record Export** and/or the **Authority Record Export**. Click **OK**. The Client will save these settings until you change them.
  - c) Display a bibliographic record from a local file that you want to export or select records from a local bib file list.
  - d) From the Action menu, choose **Export**. The record(s) are marked for export in batch mode. The export status is changed to **R** (Ready).
  - e) When ready, run batch processing.

OCLC documentation on exporting from the Connexion Client can be found in the Help files or at:  
<http://www.oclc.org/support/documentation/connexion/client/cataloging/exportimport>