Hardware and software requirements

Find the hardware and software requirements for CatExpress.

Notes to CatExpress users

OCLC Connexion browser is the cataloging system of which CatExpress is a part. CatExpress operates within the Connexion environment, so you use Connexion to access and use CatExpress. Requirements and recommendations for Connexion apply also to CatExpress.

However, examples of possible problems may mention advanced cataloging functions of Connexion that are not available to CatExpress subscribers.

Browser support

<table>
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<tr>
<th>BROWSER</th>
<th>RECOMMENDED</th>
<th>NOTES</th>
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</table>
| Internet Explorer MSN Explorer | Version 6.0 through 8.0 | MSN Explorer is based on Internet Explorer and should work with all system functions. Note: **Macintosh users**
IE 5.2 running under the OS X operating system has serious flaws that prevent many Connexion functions from working properly.
Under earlier versions of the Macintosh OS, IE 5.1 or 5.0 may work adequately with Connexion. *

Firefox | Most recent release of version 3.0.x | Version 3.0.6 or later is strongly recommended due to improved performance and security.
Earlier versions work with most Connexion functions but are not preferred.
Firefox is based on Mozilla's Gecko layout engine. Its functionality is similar, but not identical, to that of the Mozilla browser. |
*Macintosh users:* OCLC does not systematically test Connexion with Macintosh hardware, operating systems or browsers. Advice to Macintosh users is based on limited testing and user reports.

## Connexion browser and Internet Explorer 7 and 8

Users have requested information regarding Connexion's compatibility with Internet Explorer 7 and 8 (IE7 and IE8). OCLC supports Internet Explorer 7 or 8 for use with Connexion browser. Issues are addressed through application changes or suggested workarounds.


### Unsupported browsers

The following browsers are not supported for use with the OCLC cataloging system:

- Apple® Safari for Macintosh or Safari for Windows
- Google® Chrome
- Opera
- AOL (America Online)
- Lynx

### Browser navigation buttons

<table>
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<tr>
<th>BROWSER BUTTON</th>
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<tr>
<td>Back</td>
<td>Do not use.</td>
</tr>
<tr>
<td>Forward</td>
<td>• Move among system screens using only the tabs, buttons, keystroke shortcuts, and other navigation features provided in the Connexion interface.</td>
</tr>
<tr>
<td>Stop</td>
<td>Do not use.</td>
</tr>
<tr>
<td></td>
<td>• The browser's Stop button cannot cancel actions because, in most cases, the action is sent immediately to the server. The use of the stop button can also cause display problems.</td>
</tr>
</tbody>
</table>
Cache settings for best performance

About cache settings

- Browser cache settings determine how your browser handles redisplaying Web pages you have previously viewed.
- The browser may display the page as it exists in temporary storage (the browser's cache area) or download the latest version of the page from the server.
- Using the recommended settings can improve browser performance by instructing the browser to display stored pages, rather than downloading fresh pages from the server.

Note: Your browser may already be configured to the recommended settings. Many of these settings are defaults.

Recommended settings

- Set your browser to refresh Web pages automatically when necessary. Do not specify that the browser refresh a page each time you view it.
- Allocate adequate disk space for the browser cache. 10 MB is recommended. Do not specify zero space for the cache, and avoid allowing it to be larger than 50 MB.
- Do not configure Internet Explorer to clear the cache each time you exit the browser.
- Retain the browser's History (log of recently visited sites) for 4 days.

Notes on cache size

- By default, recent versions of Internet Explorer assign a very large value for cache size. In some cases it may be 200 MB or higher. Unless you regularly download many large video or Flash files, we recommend that you reduce the value for 'Amount of disk space to use' to 10 MB. This is more than sufficient for most users and greatly reduces browser overhead for maintaining the cache.
- Firefox defaults to between 5 and 50 MB of cache. You can accept their defaults unless you experience performance problems. To improve performance, it may help to change the cache size to 10 MB. A cache that is too large often causes just as many problems as one that is too small.

Before changing browser settings

- The recommended settings may not work with certain network security configurations or with some web-based applications.
- If you experience problems with Connexion browser or with other web-based applications when using the recommended cache settings, see Resolve caching problems.
- Before changing cache/history settings, write down your current settings so that you can restore them if the new settings cause problems.

Change Internet Explorer browser settings

1. On the Tools menu, click Internet Options.
2. On the General tab, under Temporary Internet Files, click the Settings button.
3. In the Settings dialog box, under Check for newer versions of stored pages, click Automatically.
4. Under Amount of disk space to use, type 10 in the text box.
5. Then click OK to close the Settings dialog box.
6. On the General tab, under History, for Days to keep pages in history, type 4 in the text box.
7. On the Advanced tab, under Security (the last group of settings in the list), clear the check box labeled Empty Temporary Internet Files folder when browser is closed.
8. Click OK to close the Internet Options dialog box.

**Change Firefox browser settings**

1. On the Tools menu, click Options.
2. In the Options dialog box, click Privacy.
3. On the Privacy tab, in the History section, make sure the check box for Remember visited pages for the last ___ days is selected. To specify the number of days, type 4 in the text box.
4. On the Privacy tab, in the Private Data section, make sure that the check box for Always clear my private data when I close Firefox is cleared (no check mark).
5. Click OK to apply the change and close the Options dialog box.

**To specify how frequently the cache is refreshed:**

1. In Firefox, clear the URL shown in the address bar. Then type about:config and press <Enter>.
2. In the Filter box, type cache to view the settings for cache-related preferences.
3. For the first item listed, browser.cache.check_doc_frequency, keep the default setting, with the number 3 in the Value column.  
   Note: This setting parallels the Automatically setting recommended for Internet Explorer.

Caution: When using the about:config settings, be careful not to accidentally change one of the many other settings on the list. Firefox saves changes automatically when you go to another web page.

**Clear browser cache**

Note: JavaScript errors after a Connexion release

- If you experience JavaScript errors immediately after a Connexion release, try refreshing affected pages first, or clear your cache once rather than changing your settings.
- For best browser performance, do not clear the cache more often than necessary.
- But to resolve problems immediately after an install, clearing the cache once may be helpful.
- If clearing the cache does not solve a persistent caching problem, see the section titled Resolve caching problems (later in this topic). Symptoms of caching problems include: old data repeatedly appearing; check boxes not remaining selected; and changes not being retained.

1. Close all browser windows, including popups. This step is **essential** for the cache to be cleared completely.
2. Start just one browser window and navigate to a non-OCLC site such as Google or Yahoo. **Do not** start any other browser windows until **after** you complete the cache-clearing process.
3. Clear the cache.

**Internet Explorer:**
1. On the Tools menu, click **Internet Options**.
2. On the General tab, under Browsing history, click the **Delete** button. In the Delete Browsing History dialog box, under Temporary Internet Files, click the **Delete Files** button. Then click **OK**.
3. Click **OK** to close the options dialog box.

Firefox:
1. On the Tools menu, click **Options**.
2. Click **Privacy**.
3. In the Private Data section, click the **Clear Now** button.
4. In the Clear Private Data dialog box, make sure **Cache** is selected. Select or clear the other check boxes as appropriate.
5. Click the **Clear Private Data Now** button.
6. Then click **OK** to apply the change and close the dialog box.

4. Close, and then restart, the browser. Log on to Connexion browser.

Resolve caching problems

- If, after using previously recommended cache settings and occasionally clearing the cache, you observe caching problems, you may need to change cache settings to correct the problem.
- **Suggested changes.** This section recommends that you set your browser to refresh pages every time you visit a page. Using the settings given in this section slows performance but can improve reliability when a workstation has a cache problem that causes the browser to display expired pages or incorrect data.
- These settings should be compatible with other web-based applications, including the following OCLC services: FirstSearch, and QuestionPoint.
- **Before changing cache settings.** Before changing cache settings, write down your current settings so that you can restore them if the new settings cause problems.

Resolve Internet Explorer caching problems

1. On the Tools menu, click **Internet Options**.
2. On the General tab, under Temporary Internet Files, click the **Settings** button.
3. In the Settings dialog box, under Check for newer versions of stored pages, click **Every visit to the page**.
4. Then click **OK** to close the Settings dialog box.
5. On the General tab, under Temporary Internet Files, click the **Delete Files** button. In the Delete Files dialog box, select the **Delete All Offline Content** button. Then click **OK**.
6. On the Advanced tab, under Security (the last group of settings in the list), select the check box labeled **Empty Temporary Internet Files folder when browser is closed**.
7. Click **OK** to close the Internet Options dialog box.

Resolve Firefox caching problems

To refresh the cache each time you visit a page:
1. With Firefox open, clear text in the address bar. Then type `about:config` and press .
2. In the Filter box, type `cache`.
3. Change the `browser.cache.check.doc.frequency` setting value to 1.
   Note: This setting corresponds to the `Every visit to the page` setting in Internet Explorer.
4. To apply the change, close Firefox. Or go to another web address by clicking the Home button or typing a URL in the address bar.

To clear the cache (and/or other data) when you close Firefox:

1. On the Tools menu, click Options.
2. In the Options dialog box, click Privacy.
3. On the Privacy tab, in the Private Data section, select the check box for Always clear my private data when I close Firefox.
4. In the Private Data section, click the Clear Now button.
5. In the Clear Private Data dialog box, make sure Cache is selected. Select or clear the other check boxes as appropriate. All selected types of data will be cleared when you close Firefox.
6. Then click OK to apply the change and close the dialog box.
7. Click OK to apply the change and close the Options dialog box.

**Cookie options**

**About cookies**

- A cookie is a message a web server sends to your browser. Usually, cookies store information the server uses to manage the session. When you close your browser, cookies that remain in memory are saved to a file on your hard disk. Internet Explorer saves individual text (*.txt) files in a cookies folder (locations vary with browser version and Windows version).
- Connexion browser uses cookies to update the session timer and keep track of your current screen. Because they are constantly recycled, cookies occupy negligible space in memory or on your hard disk.
- The timer function sends a cookie for each tick of the timer; each new cookie replaces the previous one. Each screen includes a small cookie in the HTTP header, but again the cookie overwrites the one sent with the previous screen.
- **Security/privacy.** Cookies are not required to use this system. However, some useful optional features will not work correctly if you set your browser to reject cookies. Specifically, the session countdown timer and the session timeout warning may report incorrect times. Also, without allowing cookies, you cannot save your authorization and password to avoid entering these items each time you log on. Cookies used by this system pose very little security risk because, other than the optional authorization and password (which are encrypted), no other user information is captured.

**Recommended settings**

- When first installed, both Internet Explorer and Firefox browsers are set to accept all cookies.
- For best results when using Connexion, leave this setting unchanged.
Check your cookie settings

Internet Explorer
1. On the Tools menu, click **Internet Options**.
2. In the Internet Options dialog box, click the **Privacy** tab.
3. Adjust the setting to **Medium** or **Medium High**.
4. Click **OK** to close the Internet Options dialog box.

Firefox
1. On the Tools menu, click **Options**
2. In the Options dialog box, click **Privacy**.
3. In the Cookies section, make sure that **Accept cookies from sites** is selected (checked). If not, click the box to select the option.
4. Click **OK** to close the Options dialog box.

Note: Connexion does not use third-party cookies. You can clear the box for **Accept third-party cookies** if you do not visit sites that require them.

Popup blocking software

- Software that blocks the display of popup advertisements from Web sites can interfere with Connexion functions that open separate browser windows. Examples: label displays, the list of keystrokes, authority control, and Help.
- For best results while using Connexion, turn off popup blocking software.
- If you prefer to keep a popup blocker active, configure the software to allow popup windows from the domain oclc.org.
- If you experience problems with Connexion functions after configuring oclc.org as an exception, contact the vendor of your popup blocker for information on known problems that might affect its operation.

Note: Popup blocking may be enabled on your workstation even if you have not installed a separate program for that purpose. Recent versions of browsers, security software, and other applications may include a popup-blocking tool or option. Add-on browser toolbars from search engines and portal sites, including the Google Search toolbar and the Yahoo Search toolbar, may also come with default popup blockers that need to be disabled. Before logging on to Connexion browser, verify that you have turned off all popup-blocking functionality on your workstation, or configured blocking to allow popups from the **oclc.org** domain.

Download accelerator software

- Software used to enable faster downloading of files through a Web browser can interfere with Connexion browser functions that involve downloading data to a file on your workstation.
- For best results, before exporting records to a file or creating labels for bibliographic records, turn off any download
Delayed response: do not repeat action

- Do not click again on a button or link, or repeat a shortcut keystroke, while the system is still processing an action.
- Repeating an action while the system is processing your first request actually slows completion of the requested action. The second click or keypress cancels the initial request; processing starts over from the beginning.
- The system may not respond immediately when you start a search, switch record views, or take action on a record. The specific action requested, the number of other users interacting with the server, and the speed of your Internet connection are among the factors that determine response time.
- **WorldCat interactions.** When your request results in a WorldCat interaction, the system ignores any repeated requests until you reload the page. This prevents added transaction charges and slowed responses that may occur if the system sends repeated commands.
  Note: Using the browser's Stop button while waiting for a WorldCat response may prevent the system from reactivating the requested function.

Unicode fonts recommended

- For best results when viewing and editing records and pathfinders, and when viewing web-based resources, specify a Unicode font in your browser (font settings are found in Options or Preferences). Using a Unicode font lets you take full advantage of the system’s adoption of the Unicode standard for character encoding.
- For an extensive set of diacritics and special characters, OCLC recommends that you have the Arial Unicode Microsoft font (Arial Unicode MS) installed on your workstation and specified in your browser. Microsoft provides the font with many applications, including Microsoft Office, FrontPage, and Publisher.
  Note: The Arial Unicode MS font is not installed by default with these Microsoft applications. For installation instructions, start a Microsoft application such as Word, open Help, and search Help for Unicode or Arial Unicode MS.
- The Lucida Sans Unicode font, provided with Microsoft Windows XP and Windows Vista, has a less-complete character set but may meet your needs.
- The system currently enables display and editing of the ALA character set for bibliographic and authority records. For pathfinders, the system supports entry and display of all Unicode characters, including characters from non-Roman scripts. Future releases will expand support for non-Roman scripts.
- The system uses the UTF-8 character format to communicate with Web browsers and as its internal storage format. UTF-8 is a compact encoding of Unicode, a widely adopted standard that supports the communication of a large array of characters from the world's chief languages and scripts.
- **More?** Search Help for the keyword diacritics or Unicode.

Show Connexion icon in Favorites (bookmarks)

- When you add the URL for the Connexion logon screen to the Favorites (bookmarks) list in your browser, the new Favorites item includes a Connexion icon.
- In Internet Explorer, the Connexion icon may not appear if you previously added the logon screen URL to your Favorites or to the browser’s Links bar.
- To show the icon in the IE Favorites and/or Links bar, follow these steps.
  Note: Display of icons in Firefox bookmarks may work differently.
1. In Internet Explorer, delete all existing shortcuts to connexion.oclc.org. This includes items in Favorites and items on the Links bar.
2. Clear the browser cache.
3. Close all browser windows.
5. At the Connexion logon screen, add the URL to the Favorites list. After the item appears with the Connexion icon in Favorites, you can copy the item and paste it on the Links bar or to the desktop.