# OCLC Connexion Install or Update (Generic)

March, 2011

### Download & Install Connexion Installation Files

NOTE: Connexion instructions highly recommend that you uninstall current version of Connexion before upgrading.

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| 1 | Download the Connexion client file from the OCLC Web site to the temporary folder.* Go to <http://psw.oclc.org/software.htm> , and select **Software downloads from the left column.**
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| 2 | At the **Log on** page of the OCLC Product Services Web site:* Type our OCLC authorization and password **(*see Richard or Terry for these if you don’t know them*)** and click **Enter.**
 |
| 3 | On the **Software downloads** page, find **Connexion client download file** in the center table. * Click the link for **Connexion client only version 2.10 [or latest] software if upgrading.**
* **Choose Connexion Client complete if loading for the first time.**
 |
| 4 | The OCLC Microcomputer Software License Agreement opens. At the end of the page, click **I Accept**. |
| 5 | In the **Opening Client only 210.exe** window, click **Save file** to save the download file to your desktop. |
| 6 | When finished downloading:* On your desktop, locate and click the *clientonly210.exe file* (or if download popup window appears, click **open**)
 |
| 7 | Follow prompts to complete the installation. Accept the default settings:* License agreement (“I agree”)
* Default folder
* "Just me"
* At end, if prompted to restart, you don’t need to.
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| 8 | When installation is complete, delete *clientonly210.exe* file from desktop. You may want to drag the OCLC Connexion icon (now on desktop) to your START menu. |

**Log On and Set up Communications/Options**

These should have stayed the same after upgrading, but you might want to verify. Remember to check your macros, too, if you’ve imported any others besides the default ones.

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| 1 | On desktop, double-click the Connexion Client icon:  |
| 2 | At toolbar, choose **Tools > Options.** Everything here should be okay as is, with your settings from earlier version copied to this one automatically. Just in case, check the following settings below, steps 3-8. |
| 3 | Access tab:* Internet access should be: OCLC default
 |
| 4 | Authorizations tab: Blanks should show these settings (if cataloger -- if not cataloger, you probably just have "full" authorization available to you.)* **100-032-459 cat full**
* **100-245-280 enhance enhance**
* **100-214-732 cat NACO**

Choose one to be your default authorization. |
| 5 | Batch tab:* Searching – Maximum no. of matches to download: **100**
 |
| 5 | Export tab: * Export destination should say **Gateway export: biblio.middlebury.edu** Port number **: 5500.** If not:
	+ Click **Create** button
	+ Choose **OCLC gateway export**
	+ In Host Name box, type **biblio.middlebury.edu**
	+ In Port box, type **5500**
 |
| 6 | General tab: * Session timer options: set for **10** minutes
* Offline cataloging options:
	+ Holding library: **MDYY** [all caps]
	+ Institution: **MDY** [all caps]
	+ MARC organization code: **VtMiM**
 |
| 7 | Personalize toolbar: These should also be the same way you've arranged them.* Choose **Tools > Toolbar** editor
* Drag unwanted buttons/icons from toolbar back into box and drag desired buttons from box onto toolbar
* Suggestions: Delete toolbar buttons pertaining to printing cards and labels
 |
| 8 | Spelling: * After you use for awhile, you may want to make changes in *General Options* and *Customize fields* and *Dictionaries*.
* Also, you probably want to check the box "for 505 . . ." so authors' names aren't spell-checked in that field, only titles.
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