

# OCLC Connexion Install or Update (Generic)

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## Download & Install Connexion Installation Files

### NOTE:


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

Also, if you have customized your toolbar, added macros, textstrings, or toolmaps, you should back these up before installing. (See Richard for information on how to do this if necessary)

1	<p>Download the Connexion client file from the OCLC Web site to the temporary folder.</p> <ul style="list-style-type: none"><li>Go to the Connexion Software downloads page, accept the terms and conditions, and select <b>Connexion client</b>. If you are upgrading, just choose the "client only" version. A totally new install may need the "complete software."</li></ul>
2	<p>If you are asked to log in (OCLC may not require this any longer):</p> <ul style="list-style-type: none"><li>Type our OCLC authorization and password (<i>ask Terry or another cataloger for these if you don't know them</i>) and click <b>Enter</b>.</li></ul>
3	<p>If a license agreement opens, accept it.</p>
4	<p>Save the .exe file to your computer. When it is finished downloading, double-click to open and install. Click "yes" through the prompts as necessary.</p>

## 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.

1	On desktop, double-click the Connexion Client icon: 
2	At toolbar, choose <b>Tools &gt; Options</b> . 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: <ul style="list-style-type: none"><li>• Internet access should be: OCLC default</li></ul>
4	Authorizations tab: Blanks should show these settings (if cataloger -- if not cataloger, you probably just have "full" authorization available to you. <i>For full passwords, ask Richard or Terry</i> ) <ul style="list-style-type: none"><li>• <b>xxx-xxx-459 cat full</b></li><li>• <b>xxx-xxx-280 enhance enhance</b></li><li>• <b>xxx-xxx-732 cat NACO</b></li></ul> Choose one to be your default authorization.
5	Batch tab: <ul style="list-style-type: none"><li>• Searching – Maximum no. of matches to download: <b>100</b></li></ul>
5	Export tab: <ul style="list-style-type: none"><li>• Export destination should say <b>Gateway export: biblio.middlebury.edu</b> Port number : <b>5500</b>. If not:<ul style="list-style-type: none"><li>○ Click <b>Create</b> button</li><li>○ Choose <b>OCLC gateway export</b></li><li>○ In Host Name box, type <b>mbury.iii.edu</b></li><li>○ In Port box, type <b>5500</b></li></ul></li></ul>
6	General tab: <ul style="list-style-type: none"><li>• Session timer options: set for <b>10</b> minutes</li><li>• Offline cataloging options:<ul style="list-style-type: none"><li>○ Holding library: <b>MDYY</b> [all caps]</li><li>○ Institution: <b>MDY</b> [all caps]</li><li>○ MARC organization code: <b>VtMiM</b></li></ul></li></ul>

7	<p>Personalize toolbar: These should also be the same way you've arranged them.</p> <ul style="list-style-type: none"><li>• Choose <b>Tools &gt; Toolbar</b> editor</li><li>• Drag unwanted buttons/icons from toolbar back into box and drag desired buttons from box onto toolbar</li><li>• Suggestions: Delete toolbar buttons pertaining to printing cards and labels</li></ul>
8	<p>Spelling:</p> <ul style="list-style-type: none"><li>• After you use for awhile, you may want to make changes in <i>General Options</i> and <i>Customize fields</i> and <i>Dictionaries</i>.</li><li>• Also, you probably want to check the box "for 505 . . ." so authors' names aren't spell-checked in that field, only titles.</li></ul>