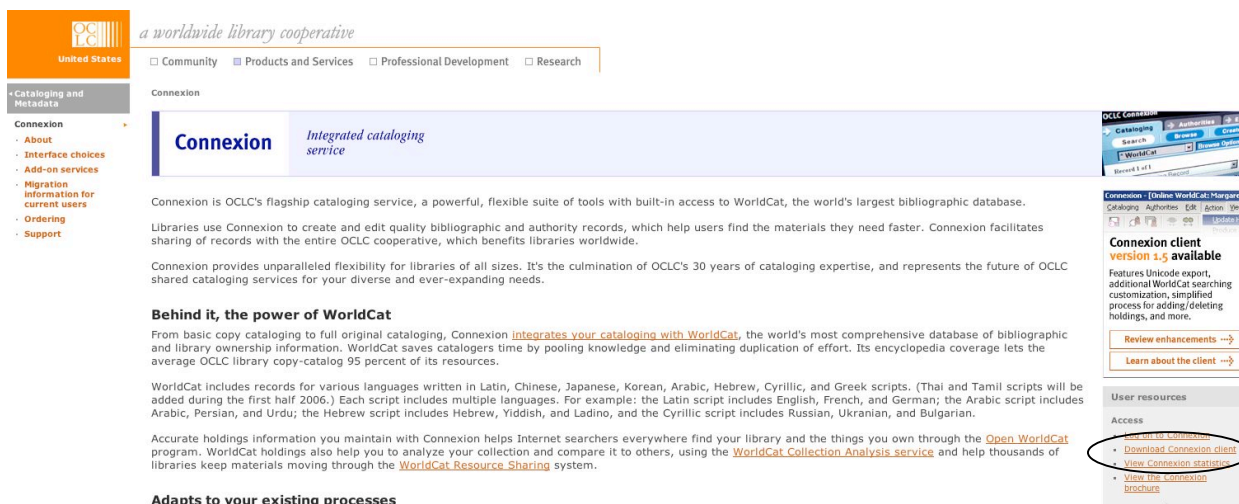


Downloading, Installing, and Configuring OCLC Connexion

Downloading and Installing the Client

1. Log on to your PC as an Administrator.
2. Open a Web browser. Go to <http://www.oclc.org/connexion>



The screenshot shows the OCLC Connexion website. The main content area features a blue header with the 'Connexion' logo and the tagline 'Integrated cataloging service'. Below this, there is a paragraph describing Connexion as OCLC's flagship cataloging service, followed by a section titled 'Behind it, the power of WorldCat' which explains its integration with the WorldCat database. A 'User resources' sidebar on the right contains a link for 'Download Connexion client' which is circled in red. The top navigation bar includes links for 'Community', 'Products and Services', 'Professional Development', and 'Research'.

Click on Download Connexion client.

3. Enter your OCLC Cataloging authorization and Password.
4. On the next screen, select

Connexion client 1.50 complete software (42.1M)
(includes Microsoft .NET Framework and MDAC).

You probably don't know if you have the up-to-date versions of .NET Framework or MDAC (or even if you have them at all), and they are both required for the Connexion client to run. It's safer to choose the complete package. Be aware that this is a large download.

5. Agree to the license. Scroll all the way to the end of the page, and click "I Accept."
6. If asked whether you want to save or run the program, choose "Save." Save the file to the desktop – it's easier to locate once the download is complete.
7. The downloaded file will be called Clientnet150.exe. Once you have successfully downloaded this file, you may begin the installation.
 - a. Make sure you are logged on to your PC as an Administrator.
 - b. Double-click on Clientnet150.exe. (Or you may click on "run" when your download completes if prompted to do so.)

- c. The program will run a self-extractor and begin to run. You don't need to do anything at this point, except to click OK when it wants to run installers, click on "Next" when you have that option, and click on the proper radio button when it asks you to accept a license agreement.
- d. The installer will look for these programs, in this order:
 - 1. .NET Framework
 - 2. MDAC
 - 3. Connexion client
- e. If it doesn't find them on your PC, or if it finds an outdated version, it will install them, in the above order.

EVERY INSTALLATION WILL BE DIFFERENT, so precise instructions at this point are not possible. You may have one, two, or three installations in this process, depending on what is already on your PC. Just agree to licenses, accept all the defaults, and let the PC install things where it wants to.

In the client part of the installation, you will be asked if you want "Everyone" or "Just me" to run Connexion. Make the appropriate choice for your library. If the login you are using to install (the Administrator login) is different from the login you usually use, choose "Everyone" (if you don't, you won't be able to see the Connexion icon when you log back in normally).

Don't worry if you see long pauses where it doesn't look like anything is happening. If the PC is inactive for more than 5 minutes, or if you have questions, call Jo at RPLS.

- 8. Once everything is installed (the last installation will be the Connexion client itself), reboot the PC (even if it doesn't ask you to). When the PC restarts, you should see a Connexion icon on your desktop. Double-click, and proceed to the next step: configuring the client.



Configuring the Client

With the client open and a gray screen visible, go to Tools > Options.

1. Click on the “Authorizations” tab to set your authorization information
 - a. Enter your cataloging authorization number (with dashes: 100-xxx-xxx) and password in the proper boxes. Under “Name,” you may put any identifier you wish – your name, your department, etc.
 - b. You may enter more than one authorization, if your library has them.
 - c. Mark the primary authorization as default, using the radio button to the left of the authorization. If you wish to be prompted each time for which authorization to use, click on the radio button at the bottom of the screen for “No Default Authorization.”
 - d. When you have finished, click on “Apply.”
2. Click on the “General” tab to enter information about your library
 - a. Click on the “Offline Cataloging Options” button.
 - b. Select your most frequently used classification scheme (Dewey, LC, etc.)
 - c. Enter your Holding Library and Institution codes, just as you did for CatME:

Your **Holding Library Code** is your OCLC symbol plus an A, if you are only cataloging one collection (for subsequent collections, branches, etc., add additional holding libraries using OCLC symbol plus a B, C, D, and so forth). For example, RPLS would be IHQA. If we had a branch or special collection other than the main collection, it would be IHQB. Smaller libraries need only one Holding Library. If your OCLC symbol is longer than 3 characters, call Jo at RPLS for instructions.

Your **Institution Code** is your OCLC symbol. For example, RPLS would be IHQ.

- d. Click on “OK.”
 - e. Click on “Apply.”
3. Click on the “Export” tab to set export parameters
 - a. Click on “File (Prompt for filename). The entry will be highlighted in blue.
 - b. Click on “Apply.”
4. Close the Options window.

You are now ready to begin using Connexion.

If you have questions regarding the download, installation, or configuration process, please call Jo at RPLS.