

Connexion Client Configuration
Bryn Mawr College IAD Department

Step One: Download the Connexion Client from OCLC Download Center

1. Point browser to: <http://www.oclc.org/download/>
2. Select "I Accept"
3. Enter Authorization Number (including dashes) and Password
4. If you need an OCLC Authorization logon, please contact Christee (x5269).
5. Select "Connexion client 1.0 complete software (includes Microsoft .NET Framework, 30M)"
6. Save the download to your desktop
7. Close the OCLC web pages when the client download is complete

Step Two: Installing the Connexion Client

1. Select the Connexion Client icon on your desktop
2. Winzip will automatically launch and unpack the program
3. When prompted, choose to continue the installation
4. A message will appear on the screen telling you Connexion Client is working (this may take a few minutes)
5. When prompted, continue the installation
6. Select access to "All Users" when prompted
7. Connexion Client will complete installation and automatically install a desktop icon

Step Three: Adding a Shortcut to the Windows Toolbar (optional)

1. Drag and drop the Client desktop icon onto the Windows toolbar.

Step Four: Setting Connexion Client Options

1. Select Tools => Options from the dropdown menu

Access Tab

- a. Internet Access Options should be set to "General Access" (default)
- b. Select Apply

Authorizations Tab

- a. Enter your Authorization Number in the correct box, including dashes
- b. Enter Password in the correct box
- c. If you require an OCLC Authorization logon, please contact Christee (x5269).
- d. Provide a Name that describes this Logon
- e. Make sure the option button under the Default column is selected next to your logon.
- f. Select Apply

Export Tab

- a. Select Create from the options on the right of the menu box (it doesn't matter what is highlighted in the Select Export Destination Box)
- b. Select Export Destination OCLC Gateway Export
- c. Enter "tripod.brynmawr.edu" in Host Name
- d. Enter "5500" in Port
- e. Select "OK"

- f. Make sure that "Gateway Export:tripod.brynmawr.edu(5500)" is highlighted under Select an Export Destination
- g. Select Apply

Fonts Tab

- a. Font should be set to default (Ariel Unicode MS). I don't recommend altering this as the special characters used by OCLC will not appear correctly.
- b. Under Records and Lists, select a display and print font size if desired. Most people prefer these set to 11 or 12.
- c. Select Apply

Record Display

- a. You may redefine the default colors (white background, black text) under this tab if you desire.
 - b. Select Apply
2. When you are finished making the necessary changes to the Options menu, select "Close"

Step Five: Creating the 949 Export Macro

1. Select Tools => Macros => Manage from the dropdown menu
2. *Note: We do not use the predefined Dewey macros provided with the Connexion client*
3. Select "New Book" from the menu at right
4. Enter "BMC" as the name for the new macro book
5. With the BMC macro book highlighted, Select "New Macro" from the menu at right
6. Enter a description of the macro when prompted. I always use something like: "Adds the 949 export field to the current record."
7. Enter a name for the new macro. I use "Export949."
8. With the macro name highlighted, select "Edit" from the menu at right.
9. **CATALOGING:** Copy and paste the below information into the Macro Editing Screen. Continue with #11 when complete.

CATALOGING MACRO (COPY & PASTE BETWEEN THE LINES)

```

-----
'MacroName:Export949
'MacroDescription:Adds the 949 export field to the current record

Sub Main

Dim CS as Object
Set CS = CreateObject("Connex.Client")

If CS.AddField(1, "949 *recs=bx;ins=bmc;b1=g;ov=.b;") = True Then
MsgBox "949 field added"
End If

End Sub
-----

```

10. **ACQUISITIONS AND SERIALS:** Copy and paste the below information into the Macro Editing Screen. Continue with #11 when complete.

ACQUISITIONS/SERIALS MACRO (COPY & PASTE BETWEEN THE LINES)

'MacroName:Export949

'MacroDescription:Adds the 949 export field to the current record

Sub Main

Dim CS as Object

Set CS = CreateObject("Connex.Client")

If CS.AddField(1, "949 *recs=bo;ct= - - ;ins=bmc;ov=.b;") = True Then

MsgBox "949 field added"

End If

End Sub

11. Save the changes to the macro by either selecting File => Save from the dropdown menu, or, clicking the file save icon on the toolbar.

12. Close the macro editing box.

Step Six: Creating the Export 949 Macro Keystrokes

1. Select Tools => Options from the dropdown menu

Keymaps Tab

- A. Select Keymap File should be set to "Custom"
- B. Default Keymap should be selected with a check mark
- C. Display Commands for Category: select "macro"
- D. In the Macro box, expand the BMC tree.
- E. Highlight the Export949 macro
- F. Place your mouse in the Press New Shortcut Key box
- G. Enter the keystroke: Shift+Ctrl+E
- H. Select "Assign" from the menu at right (this shortcut is already assigned to a Connexion function, but we don't use that function so reassign it to export 949 field.)
- I. Place your mouse cursor in the Press New Shortcut Key box again
- J. Enter the keystroke: Ctrl+1
- K. Select "Assign" from the menu at right.
- L. The Current Shortcut Keys box should now display Shift+Ctrl+E and Ctrl+1. This means you may use either keystroke to execute the 949 export macro.

User Tools Tab

- A. Under Display Commands for Category select "Macro"
- B. In the Macros box, find and highlight the Export 949 macro
- C. Under the Select New User Tool, select Tool 1
- D. Select "Assign" from the menu at right
- E. The Current User Tools box will now list Tool 1.

2. Exit the Options menu by selecting "Close"

Step Seven: Adding the User Tool 1 to the Toolbar (optional)

1. Select Tools => Toolbar Editor from the dropdown menu
2. Scroll down the Menu Items until you find ToolsUserTools1
3. Highlight ToolsUserTools1
4. Drag and Drop ToolsUserTools1 onto the Connexion toolbar
5. Select "Close" and exit the Toolbar Editor.
6. You may now also invoke the Export 949 macro by selecting the number "1" from the toolbar menu.