Update Connexion client

Find information about the newest version of Connexion client, including system requirements and how to install/uninstall the client.

Note: The following instructions will help you update to Connexion client version 3.1. If you are upgrading directly to version 3.1 from version 2.63, this update will include all of the features that were added in Connexion client version 3.0. For all the details of what was included in that release, please see Connexion client version 3.0.

Update Connexion client to version 3.1

Improvements

Decommission of obsolete features

The following obsolete features have been removed from the Connexion client 3.1 user interface:

- GLIMIR clustering option from the WorldCat Quick Search Toolbar
- ‘Category’ from the View > Sort by list options
- ‘Type’ dropdown menu from Import options

Connexion help revisions

Improvements have been made to access the help documentation within the Connexion client 3.1 user interface including updates to link directly to authority and bibliographic data field documentation from within bibliographic and authority records.

Default keymap 'CTRL+A' removed from constant data application

Since 'CTRL+A' is used in Microsoft to select all, this often needed to be unassigned in Connexion client. Now, the 'Edit Constant Data Online Apply Default' constant data application keymap is unassigned and if used frequently, will need a new keymap assigned.

Bibliographic record leader and 008 dropdown updates

The bibliographic record leader and 008 dropdown menus have been updated with current elements for the eight bibliographic formats. Missing elements were added and elements that should no longer be used were removed from the dropdown menus.
User Interface changes

The term "master record" has been updated to "WorldCat record" in support of OCLC’s commitment to advancing equity, diversity and inclusion.

Bug fixes

Generic GDI error message displayed when search results included a record that contained more than 32,764 characters in a field

When search results included a record that contained more than 32,764 characters in a field, a generic GDI error message would display. Now, the data that displays from the field will be truncated in the search results and you will no longer see the error message appear in your search results.

RDA Toolkit direct field link resolving to login screen

When the RDA Toolkit field help link was used within the bibliographic record editor, the link would resolve to the main RDA Toolkit login screen instead of directly to the specific field. Now, the field help link will resolve directly to the specific field help documentation on the Original RDA Toolkit site.

Toolbars moving after closing and reopening the client

Some users reported an issue with toolbars moving after closing and opening Connexion client. Now, the toolbars should not move after you have reopened the client.

When displaying a bibliographic record using a new user profile the record window was not maximized in the client window

The first bibliographic record displayed using a new user profile appeared as a tiny blue bar in the upper left part of the work area in the client window. Now, the bibliographic record window will appear maximized in the client window.

Closing the control headings window after clicking 'Modify Heading' inserted a controlled heading

When clicking 'Modify Heading' in the control headings window and then clicking the X to close the window, the heading was inserted into the bibliographic record instead of the window closing. Now, clicking the X to close the control headings window will close the window.

MARCXML record export from the online save file generated an error

An error message would display if a user was configured to export records in MARCXML when attempting to export a single record from the online save file. Now, the error message will no longer appear when exporting a single record from the online save file.
An error message appears when using the 'Edit a dialog box' option in the Macro Editor and Debugger

An unable to load dialog editor error message appears when using the 'Edit a dialog box' option in the Macro Editor and Debugger. Now, the error message will no longer appear when clicking 'Edit a dialog box'. This issue appears in the 3.0 but not 2.63 version of Connexion client.

Characters displaying as a rectangle instead of the actual character

A display issue with certain characters displaying as a rectangle instead of the character for certain languages such as Japanese and Burmese along with symbols such as the musical flat. This issue appears in 3.0.

Known issues

Macro slowness and freezing

Some users have reported issues when working with macros that use dialog screens that have caused macros to run slow or crash. Restarting Connexion client may help with macro slowness.

Running multiple instances of Connexion is not supported

We are aware that in the past, some Connexion client users opened more than one instance of Connexion client to support their workflows. In our Windows 10, 64-bit environment, this is no longer supported. Going forward, running multiple instances of Connexion client is not possible without utilizing multiple virtual machines (VMs).

Client 3.1 not compatible with unsupported version of Microsoft Office

Connexion client 3.1 is not compatible with versions of Microsoft Office that are no longer supported by Microsoft. If you are using an older, 32-bit version of Microsoft Office that is out of support, we suggest that you either upgrade your Microsoft Office to a newer, supported version; or, that you do not upgrade to Connexion client 3.1, but instead continue to use version 2.63.

Help icon in the Connexion macro editor is no longer supported

In the Connexion macro editor and debugger, there is a question mark icon that would previously take users to macro specific help. This icon utilized a feature that is no longer supported by Microsoft. Due to the nature of the language used to code the macro editor, we are unable to remove this icon from the user interface. There are two additional options for getting to the macro help:

1. Click on the Help menu above the toolbar, and then click Macro Help
2. Press the F1 key on your keyboard – this will open a window to Macro Help, and it will also open a Microsoft error page that we are unable to change, but can be ignored.

Both options will take you to the OCLC Macro support site.
Cannot maximize/restore (redisplay) Connexion client from a minimized position in the task bar

When you minimize the Connexion client, it becomes an icon in the task bar on your desktop, and you should be able to maximize/restore (redisplay) it by clicking the icon. If you are unable to maximize the client from the task bar icon, use one of the following workarounds.

Click the Connexion client icon in the task bar, and then press and hold the Windows key ( ) on your keyboard while you click the <Up arrow> key or use Shift+Ctrl and right-click on the icon, then click Restore.

Caution: May need to uninstall and reinstall the Cataloging Label Program

Users may need to uninstall and reinstall the Cataloging Label Program when upgrading to Connexion client 3.0 if they are unable to successful create or print labels using the Cataloging Label Program.

A full list of known issues including issues reported in Connexion client 2.63, 3.0 and 3.1 are available on the Connexion client known issues page.

System requirements

Connexion client 3.1 requires:

- Windows 10, 64-bit, version 1803 or newer
- Microsoft .NET Framework 4.7.2
- 4 GB RAM minimum
- 2 GB of available hard-disk space

Note: While you do not need to have Admin privileges to run Connexion client 3.1, you will need them to install the client. This is due to components that need to be installed and registrations needed with the operating system.

Caution: Connexion client 3.1 is not compatible with versions of Microsoft Office that are no longer supported by Microsoft. If you are using an older, 32-bit version of Microsoft Office that is out of support, we suggest that you either upgrade your Microsoft Office to a newer, supported version; or, that you do not upgrade to Connexion client 3.1, but instead continue to use version 2.63.

Install the client

We recommend backing up your existing profiles and macros before installing the new version if you are upgrading from Connexion client 2.63 to client 3.1:

- Existing profiles:
  - X:\Users\<user>\AppData\Roaming\OCLC\Connex\Profiles (where X is the letter of your hard drive and <user> is your Windows user name.)
• Macros:
  ◦ X:\Program Files (x86)\OCLC\Connexion\Program\Macros (where X is the letter of your hard drive.)
  ◦ %LocalAppData%\VirtualStore\Program Files (x86)\OCLC\Connexion\Program\Macros (if applicable)

For complete directions on installing Connexion client, see Install Connexion client.

Uninstall the client

When upgrading from version 2.63 or 3.0 to version 3.1, Windows will do an upgrade and not force you to uninstall the previous version. If you already have version 3.1 and need to reinstall it, you will need to uninstall your current installation of 3.1 first. If you are prompted to remove previous versions, follow these steps:

1. Navigate to Control Panel > Programs and Features > Uninstall a program.
2. Select OCLC Connexion client from the list of programs.
3. Click Uninstall.
4. Click Yes to confirm.

Note: If you upgraded to client 3.1 and decide to move back to client 2.63, you will need to uninstall client 3.1 before installing client 2.63. Having both versions of client on your computer at the same time would cause macro and other system failures.

Connexion client version 3.0

Introduction

During the Connexion client 3.0 project, OCLC stabilized and refreshed the Connexion client technology by:

• Modernizing the build, compiler and distribution process
• Upgrading components to 64-bit (as much as possible)
• Resolving security issues
• Repairing high priority bugs and UI changes
• Decommissioning obsolete features
• Collecting usage metrics to inform future changes
• Moving all Help to OCLC website
• Better display of non-Latin scripts
• Allow you to run the client or macros on your PC without being an Admin.
  Note: You do need to be an Admin to install Connexion client 3.0.

Improvements
Upgrades to Connexion components

Connexion client components have been upgraded to be compatible with the 64-bit version of Windows 10. This means that the system now supports only the 64-bit version of Windows 10.

Additionally, the client has been configured so that users no longer need to be Administrator on their computers to run the software and/or macros. Macros are being moved to a different directory to support this change. (Elevated privileges are still required to install the client).

Macros were previously installed to: X:\Program Files (x86)\OCLC\Connexion\Program\Macros and are being copied to: X:\Users\<user>\AppData\Roaming\OCLC\Connex\Macros (Where X is the letter of your hard drive and <user> is your Windows user name).

Because of this upgrade, a change was needed to existing macros in order to function properly. Within each macro, every instance of CreateObject("Connex.Client") must change to: GetObject(,"Connex.Client"). A conversion process will run automatically whenever the client is launched. [Note the comma after the open parentheses]

Original, unconverted macros will continue to reside in their original location.

User Interface changes

Select changes have been made to the client user interface in conjunction with decommissioned features and in support of OCLC initiatives.

The decommissioned Message of the Day has been replaced with a Welcome screen. The new dialog will continue to provide Support information and inform the user of their level of cataloging authorization.

Connexion client will also sport a newly redesigned splash page when the client is launched.

Finally, in support of OCLC’s commitment to advancing equity, diversity and inclusion, the following changes are being made within the user interface of Connexion client:

• The authorization mode formerly called “master mode” has been renamed “quality mode”.

Decommissioned obsolete features

The following obsolete features have been removed from the Connexion client user interface:

• Message of the Day
• GLIMIR features
• Institution Records functionality
• Harvest Web Content
• Extract Metadata
• Attach Digital Content
• Embedded Connexion Client Help (moved to online support site)
Usage metrics to inform future changes

For select features for which we previously did not collect metrics, OCLC will be leveraging Google Analytics to inform future Connexion client releases.

Connexion help revisions

With the decommissioning of the embedded Connexion client help system, all documentation for the client has been reviewed, revised, and moved to OCLC’s support site. Links and Help buttons within the client will now guide users directly to the online documentation. This allows for ease of searching and more timely and efficient updates.

Macros updates

- Macros are being relocated in Connexion client 3.0.
  - Currently, macros are installed to `X:\Program Files (x86)\OCLC\Connexion\Program\Macros`, where X is the letter of your hard drive.
  - In Connexion client 3.0, macros will be copied to `X:\Users<user>\AppData\Roaming\OCLC\Connex`, where X is the letter of your hard drive and <user> is your Windows user name.
- Within each macro, every instance of `CreateObject("Connex.Client")` must change to `GetObject(,"Connex.Client")`. This conversion will run automatically when the client is launched.
- Original macros will remain in the old directory.
- OCLC and Dewey macro books shipped with client 3.0 are already converted and will be installed in the new location.

Better display of non-Latin scripts

Client 3.0 uses the Microsoft .NET Framework 4.7.2 which enables use of non-Latin scripts that previously required fonts to be downloaded to view and use in the client.

Bug fixes

Admin to run Connexion client is no longer required

Previously, a change to the registry was needed to set the client run permissions down to user access. This was required for the use of macros, access to network drives and network printers, and access to third party application such as Macro Express.

This registry change is no longer needed, and users can now run as a standard user without encountering the above issues.

False “Unidentified publisher” system warning in Windows 7, 8/8.1 and Windows 10 upon startup of client

Previously, if you use version 2.63 of the Connexion client in Windows 7, 8/8.1, or Windows 10, you receive a Windows
User Account Control (UAC) system warning each time you start the client.

A new certificate has been used with version 3.0 which has eliminated the “unidentified publisher” system warning.

**Macros now working in users groups**

Previously, anything related to macros would cause severe errors when running the client in the users group. This has been resolved.

**Client will now halt a batch session for Update Holdings or Delete Holdings if the session is inadvertently terminated**

Previously, if a batch session was terminated, the request to the Connexion host resulted in an HTTP 503 error (Service unavailable) being returned to the client because the session no longer existed. The client continued sending the remainder of the commands in the batch but shouldn't. This resulted in thousands of 503 errors at times.

This issue has been resolved for batch sessions that Update Holdings or Delete holdings. In a future release, we will work on other batch processes (Submit for Review, Replace Record, etc.)

**Security issues due to HKey_Local_Machine\OCLC resolved**

Windows registry issues have been resolved as part of the effort to remove the requirement to be Admin to run Connexion client.