Importing Bibliographic Records
from OCLC to Local Voyager Databases

Exporting MARC bibliographic records from OCLC is one of the many workflow options available to I-Share libraries. Export functionality for Voyager requires copying records to a local file on the PC, then importing the records from that file through either the Cataloging client or the Acquisitions client. Your library will have a number of options both for creating export files and for importing them to Voyager. Your library should choose the methods that best suit your workflow.

These instructions are subdivided into two parts. The first covers the export of records from OCLC, and includes instructions for both Connexion via web browser in section I.A and the Connexion Windows client in section I.B. The second part will cover importing records into the Voyager database using either the Cataloging client in section II.A or the Acquisitions client in section II.B.

Part I. Exporting from OCLC

I.A Exports Using Connexion via a web browser

A library's existing cataloging authorization will allow catalogers to log on to Connexion via a web browser at http://connexion.oclc.org/. From there, users may search the WorldCat database and update/produce or export records.

In the I-Share environment, you should choose the option to export bibliographic records or authority records to a file on the Connexion server, and then download the file to your workstation.

To set your Preferences for export, on the **Genera**l tab →**Admin**, choose **Preferences** from the drop-down menu and then select **Export Options** from the list.

Choose **MARC** for the Flagged Bibliographic Record Export Format.

Choose **Export to a File** for the Export Destination.

In the "Fields to Delete on Export" section, Bibliographic record, input **035,** and optionally **029**. If you enter more than one field in this input box, be sure to separate the field tags with a comma. No punctuation other than a comma or a hyphen (to designate a range of field tags) should be included in this input box.

The other Export options may vary depending on your local workflow. Consult the Connexion **Help** for information about the other options.

Note: you do <u>not</u> need to fill in the TCP/IP sections because you are exporting to a file rather than to a TCP/IP Connection.

The "Export Options" in General tab →Admin → Preferences:

Once you have searched for and located a record, you may choose to view it in a "display" mode or an "editing" mode via the **Edit** drop-down menu. To export the record, go to the **Action** drop-down menu, and select **Export Record in MARC**. This action puts the record into an export file on the Connexion server.
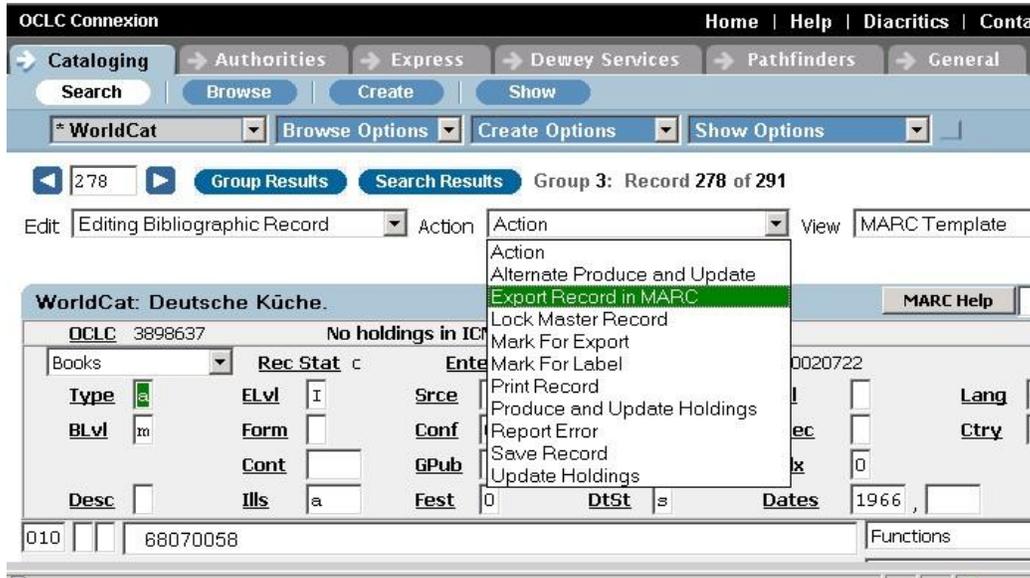
Once you have records in an export file on the Connexion server, you must download them to your PC. Go to the **General** tab → **Admin** and choose **Download Export Files** from the drop-down menu. Select the files to download by checking the box in the **Select** column, then click **Download**.
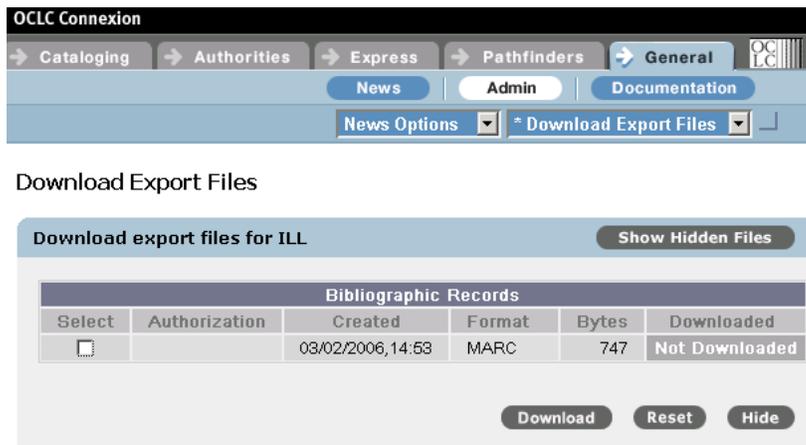
In the dialog box that follows, save the file to your PC in a location of your choice. Consult the Connexion **Help** for more information on downloading files.

As of this writing, records are exported in non-Unicode format from the Connexion Web Browser. This means the Voyager Cataloging Client must be set to import the records with a non-Unicode character set. **MARC21 MARC8 (non-Unicode)** is the best choice of the non-

Unicode character sets because it allows the largest number of characters to be imported correctly. For more information, see *Part II. Importing MARC Records to Voyager* below. Staff using Connexion Web should skip to Part II of this document. The next section applies to users of the Connexion client only.

I.B Exports Using the Connexion Windows Client

The Connexion Windows Client offers a combination of the searching and editing flexibility found on Connexion's web service with a Windows look and feel that includes menu-based commands and use of macros.

By default, the Connexion client will prompt for a file name on exports; however, you may choose to define a set file name. To create a standard export file, go to the **Tools** menu → **Options** → **Export** tab.

Select the **Create** button.
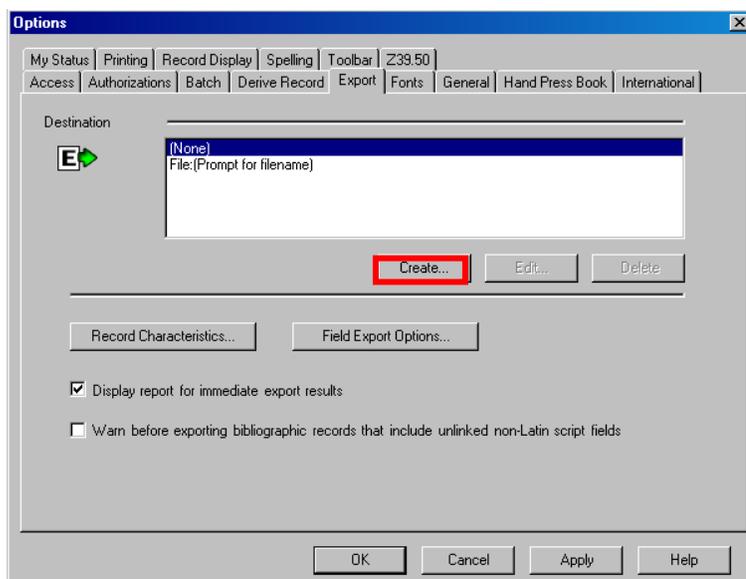
Then choose **File** and click the **OK** button.
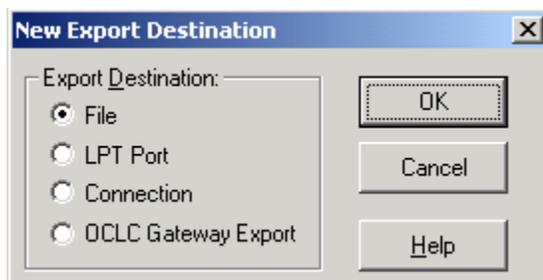
In the "Export Filename" dialog box, change to the folder where you want your file, then enter the name of the file, and click **Open** to create the file, as seen in the example below.

Confirm that you want to select this file as the default export file by clicking **OK** on the Export Destination File dialog box.
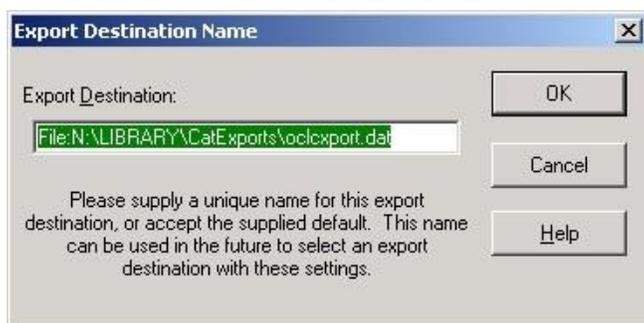
When you are returned to the **Options** dialog box, click on the **Record Characteristics** button.
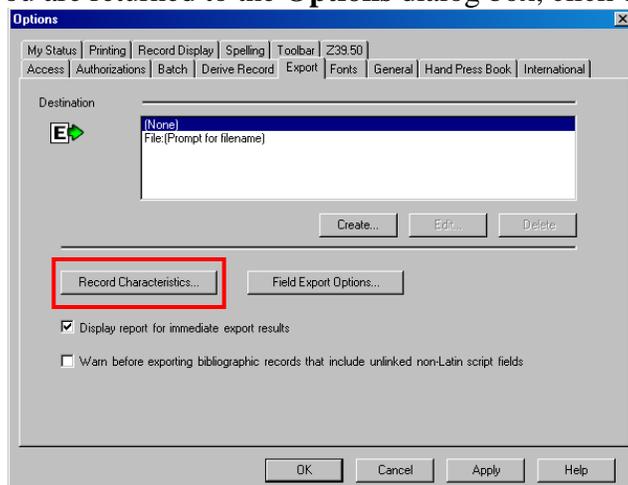
Choose **UTF-8 Unicode** in the **Character Set** boxes:
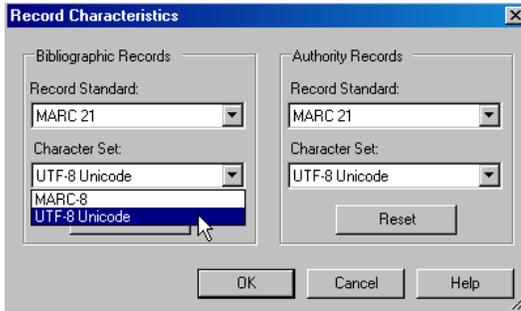
Records will be exported in Unicode format, so the Voyager Cataloging Client Preferences must be set to import records in **MARC21-UTF8**.

Next, click on the **Field Export Options…** button.
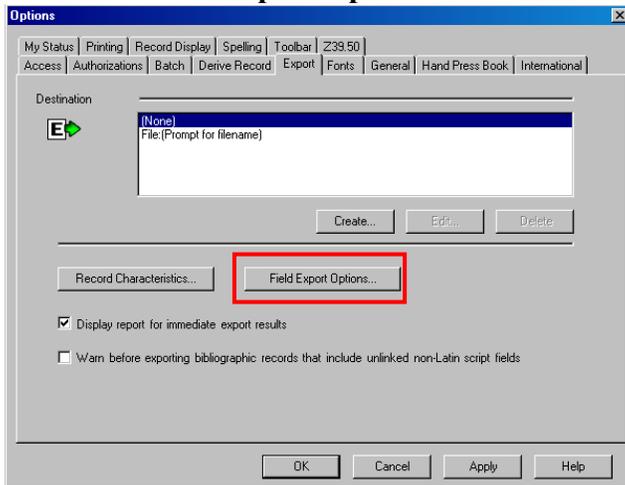
In the Field Export Options box, enter **035,** and optionally **029** into the "Fields to Delete Bibliographic Records:" inbox box. If you enter more than one field in this input box, be sure to separate the field tags with a comma. No punctuation other than a comma or a hyphen (to designate a range of field tags) should be included in this input box.
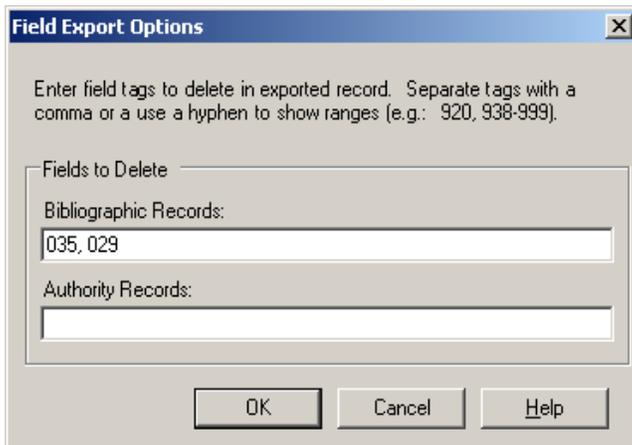
Click **OK**.

For more information on why the 035 field should be Deleted from exported records, please see the document at
http://www.carli.illinois.edu/mem-prod/I-Share/cat/oclcnmbrs.pdf

Then click **Apply** and **Close** to close the Options window.

The first time you export a record, this file will be created on your PC. Any subsequent record exports during the same Connexion session will append to that same file. If you perform record exports during later (new) Connexion sessions and the original export file still exists on your PC, you will be prompted to either Overwrite the file, Append the new records to the file, or Cancel:
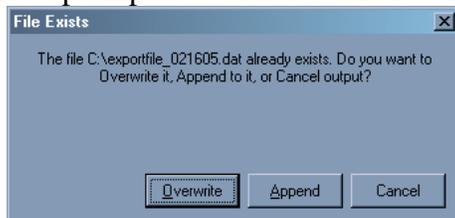
If you choose not to define a regular save file, Connexion will prompt you for a filename and location for the export file the first time you export. This only occurs once for each time that you run the Connexion client. If you have another file as the default export file, then no prompt appears when you export records.

1. To export a record in the Connexion client, do the following:

2. Connect to OCLC Services, using the connect button, or using the **File** menu → **Logon**.

3. Search WorldCat, using the search button, or using the **Cataloging** menu → **Search** → **WorldCat** (F2).

4. Perform your search and locate the record you want for your catalog.

5. With the record you want on the screen, you may click the export button, or go to the **Action** menu → **Export** (F5). For the first export of a session, if your export options are set to prompt for a file name, you must now enter the desired export file location and name. You will not be prompted again without closing and restarting the client.

Part II. Importing MARC Records to Voyager

You may import records into Voyager through either the Cataloging or Acquisitions client. Both clients offer some workflow advantages, so library staff should familiarize themselves with each method.

II.A Importing in the Cataloging Client

Libraries may find that using the Cataloging client will be more efficient for importing records as this client can be configured to identify the default file locations for previously exported records (**Options** menu → **Preferences** → **Folders/Files** tab → **Folders** section → **Import**). Additionally, only in the Cataloging client can libraries edit a record prior to import. Once a record has been imported in the Acquisitions client, it can only be edited or deleted via the Cataloging client.

When bibliographic records have been exported from OCLC using the Unicode character set, the Voyager cataloging client must have its Preferences (**Options** → **Preferences** → **Mapping** tab→ **Expected Character Set of Imported Records**) set to MARC21 UTF-8.

When bibliographic records have been exported from OCLC using the MARC8 character set (i.e., non-Unicode), the Voyager cataloging client must have its Preferences (**Options** → **Preferences** → **Mapping** tab→ **Expected Character Set of Imported Records**) set to MARC21 MARC8 (non-Unicode).

Except for very unusual circumstances, you'll want to make sure that in the Cataloging client Preferences (**Options** → **Preferences** → **General** tab) that the **Bibliographic Import/Replace Profile** is set to **OCLCConditional** so that the system will detect duplicate records.

If existing local records will be <u>replaced</u> by the imported records, library staff should take care to exercise safe bibliographic replacement techniques.[1] This scenario frequently occurs with short records created for Acquisitions that need to be replaced with a full record when the item is received. If this is the case, steps A and B below should be performed before step 1:

A. If the bibliographic record is not already suppressed either with the "Suppress from OPAC" box checked or using the 'Suppress from UC' option where the bib contains 049 $u nouc, suppress the record using one of these two methods. Wait for the amount of time necessary according to the "Safe Bibliographic Record Replacement Routines" document.

B. Once the necessary amount of time has passed, add the OCLC record number to the existing record. Open the Cataloging client to search for the record and display it on the screen. Add an 035 field, subfield a, and enter the OCLC number with a prefix of (OCoLC)ocm or (OCoLC)ocn, depending on the number of digits in the OCLC number.

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[1] Safe bibliographic replacement practices involve making changes to records in steps, in order to maintain the integrity of bibliographic and holdings records in the I-Share Universal Catalog. For specific details on following these practices, see "Safe Bibliographic Record Replacement Routines."

Save to DB.
Ex.: 035 _ _ ‡a (OCoLC)ocm12345678

035 _ _ ‡a (OCoLC)ocn123456789

1. In the Cataloging client, go to the **Record** menu, choose **Import → from New File**. Select the file you created in the OCLC export. A list of the records will be displayed.

2. To import any record, select it. Note, you will need to click a record again to "unselect" it. Click **OK** when ready to import.
   *Workflow note: Records may be imported one at a time or all at once. Single imports are preferred if any bib data should be edited. Single imports also make it easier to deal with bib replacements. Imported records will each appear in a separate window. The title bar of each window will begin "Imported record" and will also include the record number from OCLC.

3. Edit the bibliographic data as appropriate and according to your local cataloging practice.

4. Click the **Save to DB** button (with the sailboat) to save the record in the database.

   a. *If no duplicate records are detected* and your preferences are set to do Authority Validation, you will see a list of headings used. If you will not be doing authority work immediately, click **Continue**. After saving, the title bar of the record window will now display a BIB ID.
   Note: Clicking **Close** on this screen will cancel the save operation.
   *Workflow note: Unfinished records may be saved to a local file using the **Save** button if desired.

   b. *If a duplicate record is detected in the database*, or if you will be overlaying a short record, you will see the "Bibliographic Dedupe Detection" screen.
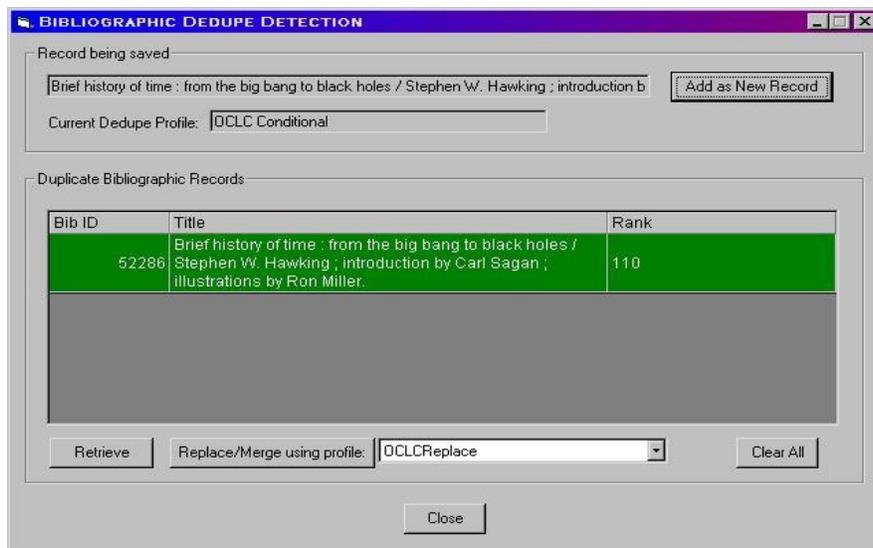
   This window will display duplicate records from the local database, along with a rank that indicates the strength of a match. Clicking **Retrieve** will display the selected duplicate record from the local database and cancel the save. Clicking

Close will cancel the save only.

NB: The default button on this screen is **Add as New Record**. If you hit the <Enter> key while on this screen, you will add the record, and possibly create a duplicate in your database. Be sure to click the option you need.

i. If the Rank is less than 100, view the duplicate records to see if they may represent different items (records that may have the same ISBN or ISSN or other numbers). After evaluating the matching record, you may wish to click **Add as a New Record** if the new record represents a different title than the duplicates.

ii. If the rank is 100 or greater; or
you are replacing a short record; or
you are replacing a bib record that has been upgraded in OCLC,
click **Replace/Merge using profile: OCLC Replace**.
Do not replace a bib record that does not match on the OCLC record number, which is listed in the 035 field of the duplicate bib. This can possibly cause problems in the I-Share Universal Catalog (UC).

II.B Importing in the Acquisitions Client

The Acquisitions client is less flexible than the Cataloging client in importing records, as it does not provide the user with the ability to replace a duplicate record. Instead, the user is prompted to link a purchase order line item to the existing bib record. Still, if your library's policies and workflow allow for selection of bib records during the order process, then the import function will serve you well.

When bibliographic records have been exported from OCLC using the Unicode character set, the Voyager Acquisitions client must have its preferences (**Tools → Workflows → Character Set Mapping for Local Import**) set to MARC21 UTF-8.

When bibliographic records have been exported from OCLC using the MARC8 character set (i.e., non-Unicode), the Voyager cataloging client must have its preferences (**Tools → Workflows → Character Set Mapping for Local Import**) set to MARC21 MARC8.

1. Create a Voyager purchase order according to your library's practices.

2. Click **Add Line (Bib Import)** to retrieve records exported from OCLC.

3. Choose the file containing the records exported for the order.

4. Select the title(s) to add and click **OK**.

5. Click **Close** when done selecting records, and the title(s) will be added to the bottom of the PO screen.

    If there is a matching record in the database, you will see the following prompt:

    You may answer yes to add the line item using the record from your database, but you may also want to investigate the record before approving the order.
    *Workflow note: It is possible, and perhaps desirable to add multiple line items to the purchase order at one time. Note however that the message above does not clearly note which title was duplicated.