

Import Records from OCLC Services and Resolve Batch Records in Connexion

Introduction

This quick reference has instructions for:

- Downloading records produced from OCLC services you use or subscribe to from the [OCLC Product Services Web](#). Examples include records from batch services, the MARC subscription service, or Bibliographic Record Notification.
- Importing the records into Connexion via the client or browser.
- Retrieving imported records via the client or browser.
- Processing any unresolved (unmatched) batchload records.

Download OCLC records

To download records from the OCLC Product Services Web:

	Action
1	Type http://psw.oclc.org in your browser and press <Enter>.
2	In the OCLC Product Services screen, in the list on the left, click Records and reports .
3	Click the link for the service that supplies the records you want.
4	When a Logon screen opens, enter your OCLC authorization number and password and click Enter or press <Enter>.
5	Click the Download link next to the record file you want.
6	In the File Download window, click Save .
7	In the Open window, navigate to a folder where you want to save the file and click Save .

Note: Records and reports are kept on the OCLC Product Services Web site for downloading for 90 days from the day they are posted.

Import downloaded records using the Connexion client

	Action
1	Open the client and click File > Import Records (or press <Alt><F><I>).
2	In the Import Records window, specify the file of records you downloaded: In the File to Import box, type the full path and file name. Or Click Browse to navigate to the file, and then click OK to enter the path in the box
3	Under Destination , select a button for the save file to import to: Import to Online Save File (logon required) Or Import to Local Save File (logon not required) Imports to your designated default local file. To designate a different local file as the default, or to create a new file and designate it as the default, click Local File Manager .

	Action
4	Click Options to set options for supplying data or adding an identifier to the imported records: <ul style="list-style-type: none"> • Apply constant data to imported records – Under Apply Default Constant Data, click to select or clear the Bibliographic check box. Applies online default constant data to records imported to the online save file, or applies local default constant data to records imported to the local save file. • Apply a free-text My Status identifier to imported records – Under Assign My Status to Bibliographic Records: In the Type list, select the OCLC service that supplied the records. And/or In the Identifier box, type a free-text identifier The total limit for My Status is 40 characters.
5	Option: Click Record Characteristics to select a record format (MARC 21, Dublin Core Qualified, or Dublin Core Simple) and/or character set (MARC-8 or UTF-8 Unicode) for imported records.
6	When ready, click OK or press <Enter>. <p>Results:</p> <ul style="list-style-type: none"> • The client imports the records and assigns the source status Imported to them. • The client asks if you want to delete the original import source file. Click Yes to delete or No to keep the file. • A temporary import report opens showing the path and file name of the import source file and how many records were successfully imported. <p>Tip: To keep the report, copy and paste the contents into a text editor file or print it (click File > Print or press <Ctrl><P>) before closing. The client does not save the report.</p>

Import downloaded records using the Connexion browser

	Action
1	Log on to Connexion at http://connexion.oclc.org .
2	In the Cataloging tab, expand the Create Options list and click Import Records .
3	Under Type of Records to Import , click to select the Import Bibliographic Records check box.
4	Specify either the file location or the URL of the file of records you downloaded: Under File Location , in the Disk box, type the full path and file name, or click Browse to navigate to the file. Or In the URL box, type the complete URL for a file located on a Web server, beginning with http:// .

	Action
5	<p>Options: Set options for supplying data or adding an identifier to the imported records:</p> <ul style="list-style-type: none"> Apply constant data to imported records – Under Import Bibliographic Records, select the Apply Default Constant Data check box. Apply a free-text My Status identifier to imported records – Under My Status for Bibliographic Records: In the Type list, select the OCLC service that supplied the records. And/or In the Identifier box, type a free-text My Status identifier. The total limit for My Status is 40 characters.
6	<p>When ready, click Import.</p> <p>Results:</p> <ul style="list-style-type: none"> The browser imports 100 records at a time. If more than 100 records are in the file, a message asks you to click OK or press <Enter> to continue importing the next 100 records. The browser assigns the source status Imported to the records. The browser displays the number of records imported.

Find imported records

Note on the Connexion save files: OCLC provides a single online save file for each OCLC logon authorization. Therefore, when you import records to the online save file, you can retrieve them using either the client or the browser interface. Local save files are available in the client only.

Find records by "showing" the save file status "Imported"

In the client:

	Action
1	Click Cataloging > Show > By Online Save File Status (or press <Ctrl><O>). Or Click Cataloging > Show > By Local Save File Status (or press <Alt><C><H><L>).
2	In the Status List window, under Source Status , click the check box next to Imported .
3	Click Show Records or press <Enter>. A list of imported records opens.

In the browser:



	Action
1	On the Cataloging tab, click to expand the Show Options list and then click By Status .
2	On the Status list screen, under Source Status , click the check box next to Imported .
3	Click Show Records or press <Enter>. A list of imported records opens.

Find records by searching the save file

You can also retrieve imported records by searching the online save file (using the client or browser) or the local save file (client only) for:

- Source status **Imported**
Or
- My Status identifier you assigned when you imported

In the client:

	Action
1	Click Cataloging > Search > Online Save File (or click  or press <Ctrl><F3>). Or Click Cataloging > Search > Local Save File (or click  or press <F3>).
2	In the middle of the search window, in the text box to the right of Source Status , expand the list and click Imported . Or In a Search for box, type a word or phrase in the My Status identifier you assigned when you imported records, or type the complete My Status. Then select My Status in the index list to the right of the box.
3	Click OK or press <Enter>.

In the browser:

	Action
1	On the Cataloging tab, expand the Search Options list and click Save File .
2	At the bottom of the Search Save File screen, open the Source Status list and click Imported . Or Above the status lists, in the Search for box, type a word or phrase in the My Status identifier you assigned when you imported records, or type the complete My Status. Then select My Status in the index list to the right of the box.
3	Click Search or press <Enter>.

Conversion details for imported records

- Records are assigned the source status **Imported** and the workflow status **In process**.
- MARC21 records are converted to OCLC-MARC.
- The expiration date for online save file records is set to 14 days.
- The expiration date for unresolved batchload records in the online save file is set to 28 days.
- No expiration date is set for records imported to a client local file.
- The OCLC control number is retained in field 001
- If the **Lang** value in the fixed field (008/35-37) is 3 blank spaces, the blank spaces are converted to **zxx** (no linguistic content).
- If a record contains a field 533 ¶7, the data is converted to a 539 field.
- If present, fields 994 and 003 are deleted.

Unresolved batchload records

- Unresolved records are bibliographic records in a batchload project that you submitted to the OCLC Batchload service for which no matches were found in WorldCat.
- These records fail to match for many reasons, including legitimate differences in cataloging practice, data errors, and other problems.
- Unresolved records have:
 - The word **NEW** instead of an OCLC control number.
 - Identifiers in field 951 if the unresolved records are generated by a group batchload project.
- OCLC posts batchload processing summaries and exception logs for your batchload projects on the [Product Services Web](#). If projects contained unresolved (unmatched) records, a file of the records is also posted for downloading and resolving.

Reminder: All reports and record files, including batchload results, are posted on the Product Services Web for 90 days only.

Process unresolved batchload records

	Action
1	Download your unresolved batchload records from the OCLC Product Services Web , import them into Connexion, and retrieve them from the save file using the client or browser, as described in the procedures above.
2	Search WorldCat for each item to see if a record exists.
3	<ul style="list-style-type: none"> • If a record exists: Follow local practice to determine whether to use the record you found instead of the one from your project. <ul style="list-style-type: none"> ○ For a record in an individual institution project: If you use the WorldCat record you found, edit it as needed. ○ For a record in a group project: Copy the library identifier from the 951 field in the unresolved record and paste it into the WorldCat record you found. • If no record exists: Edit the unresolved record as needed.
4	Take a final action on the record, such as update holdings or produce, or re-save the record or export it.
5	Optional. Delete the original downloaded record from the save file.

Support

OCLC support staff

E-mail: support@oclc.org

Or

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Within the Connexion client or browser

- **In the client:** Click **Help > Contact Support**.
- **In the browser:** Click **Contact** in the OCLC Connexion title bar.