

# Table of Contents

<b>Uploading MARC Records to OCLC</b>	1
<i>Prepare Records for upload</i>	1
<i>Name the MARC File</i>	2
<i>Upload the MARC File</i>	2
I. Via WorldShare	2
II. Via SFTP	3
<i>Additional Info</i>	3
Local System Number (LSN)	3
<b>Check Reports</b>	4
<b>Edit Uploaded Records in WorldShare</b>	4
<b>See this page for instructions on how to fix unresolved records</b>	6
<b>Past Uploads</b>	6



# Uploading MARC Records to OCLC

## Prepare Records for upload

1. Go to this MARC record set checkout view  
[https://nnels.ca/admin/content/exporter/recordset\\_checkout\\_base](https://nnels.ca/admin/content/exporter/recordset_checkout_base)
2. Keep all default filters as is, and change the following filters to:
  1. Partner Share = "Any"
  2. Availability/Status = "Produced"
  3. Enter the appropriate dates in the "File uploaded between \_\_and\_\_ fields." For example, if the last record set uploaded to OCLC included records present on Drupal up to January 26, 2019, for the new upload, locate the records uploaded between 2019-01-27 and 2020-01-22 (the date of the export)
4. Click Apply

The screenshot shows the 'MARCXML Record Export Checkout' form. Annotations point to specific filter settings:

- 2a**: Points to the 'Partner Shareable?' dropdown menu, which is set to '- Any -'.
- 2b**: Points to the 'Availability / Status' dropdown menu, which is set to 'Produced (available)'.
- 2c**: Points to the 'File Uploaded Between' date range selector, which is set to '2019-01-27' and '2020-01-22'.

3. Select all records
4. You will see the option to select all the records, not just the ones visible on that page, click that button
5. Click Generate MARC XML export file

The screenshot shows a table of records with annotations:

- 3**: Points to the 'Generate MARC XML export file' button in the 'Operations' bar.
- 4**: Points to the 'Select all 1776 rows in this view' button in the table header.
- 5**: Points to the 'Generate MARC XML export file' button in the 'Operations' bar.

NID	Title	Access Rights	Item ID	File Format	Running Time (seconds)	Performed / Narrated by	Partner Sharing	Date	Name of Publisher	File Uploaded
196339	The jazz portraits: Oliver Jones.	Requires Login	View Item 2765785	DOC				2019	BC Libraries Cooperative	12/17/2019 - 15:06
196834	Winnie's great war	Requires Login	View Item 2809534	MP3	33712	Kathleen McInerney	Not permitted	2018	Little, Brown for Young Readers	12/11/2019 - 17:57
71874	The Enlightened Gardener Revisited	Requires Login	View Item 2809210	MP3	35127	Toby McKee	Not permitted	2018	Lone Pine Publishing	12/09/2019 - 16:21

6. Follow [Export MARC records from Drupal](#) instructions from step 6 onwards and the instructions Convert from MARC XML to MRC using MarcEdit on the same page
7. Please read the following section to find out how to name the MRC file

## Name the MARC File

1. The filename contains 3 parts, each separated by a period . :
  1. a 7-digit data sync Collection ID
  2. the OCLC institution symbol CANEL for NNELS, and
  3. optional alphanumeric characters in upper or lower case to identify a particular upload
2. For regular upload to update NNELS holdings on OCLC, please use the Collection Records Added to WorldCat, with the ID 1031295
3. Add NNELS' OCLC institution symbol CANEL after the Collection ID: e.g., 1031295.CANEL.
4. And then add the optional third part to identify the records being uploaded, for example, the date of the last record or record set. In this case, the last record set was exported from Drupal on January 22, 2020. So the filename will be: 1031295.CANEL.20200122.mrc

## Upload the MARC File

There are two ways to upload MARC files to OCLC, via WorldShare or via SFTP. WorldShare is more user-friendly. However, when problems occur or when the MARC file is larger than 1GB, please try SFTP.

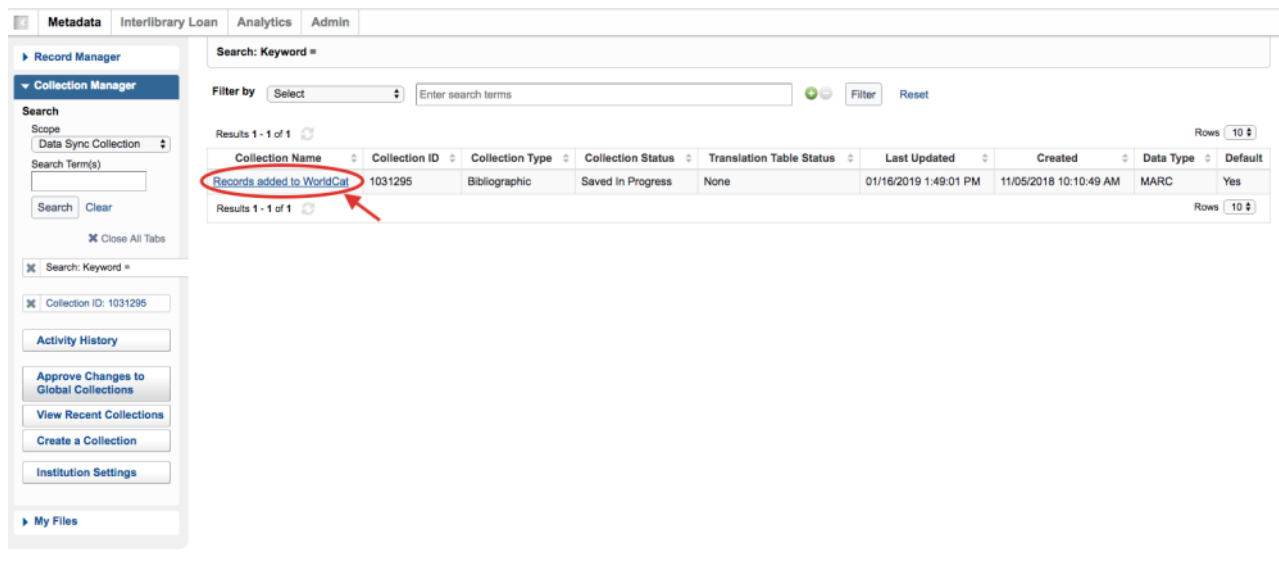
### I. Via WorldShare

1. On [OCLC WorldShare](https://worldshare.oclc.org/), go to My Files.
2. Click Uploads.
3. Click Choose File to retrieve the MARC file from your computer.
4. Leave File Type as Data sync bibliographic.
5. Click Upload, and wait for the file to be uploaded, which may take a while.

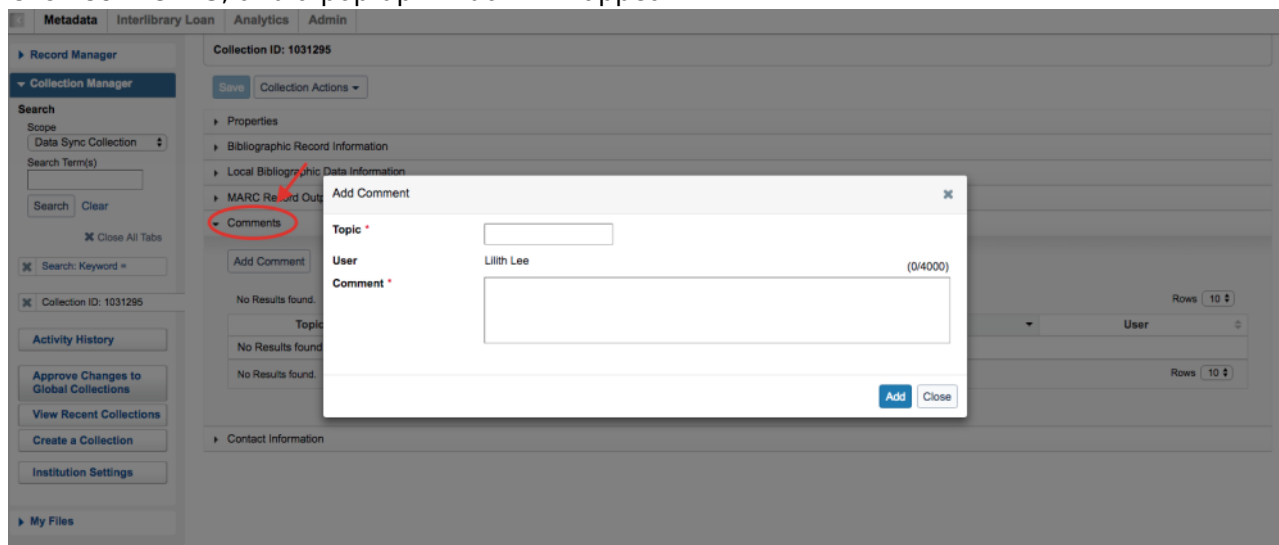
The screenshot shows the OCLC WorldShare interface. On the left, the 'My Files' sidebar is expanded, and the 'Uploads' button is highlighted with a red circle and arrow labeled '1'. In the main area, the 'Upload File' section has a 'Choose File' button highlighted with a red circle and arrow labeled '3'. Below it, the 'File Type' section has 'Data sync bibliographic' selected with a red circle and arrow labeled '4', and the 'Upload' button highlighted with a red circle and arrow labeled '5'. The 'Upload' button is also highlighted with a red circle and arrow labeled '2'. The 'File Name' field shows '1031295.CA...90127.mrc'. Below the 'File Type' section, there is a table with columns 'File Name', 'File Type', 'Size', and 'Upload Date'. The table is currently empty, showing 'No results'.

Note that once the file is uploaded it can't be changed. The best way to contact OCLC staff about the upload is through the Collection's comment form. Comments can be added at any time:

1. Go to Collection Manager.
2. Choose Data Sync Collection under Scope.
3. Enter the Collection ID under Search Term(s).
4. Click on the Collection Name.



5. Click Comments, and a pop-up window will appear.



## II. Via SFTP

1. Download [FileZilla](#) (or you can use other SFTP sites)
2. Follow [OCLC's instructions](#).
3. Information for NNELS: Content Coordinator can provide login

## Additional Info

### Local System Number (LSN)

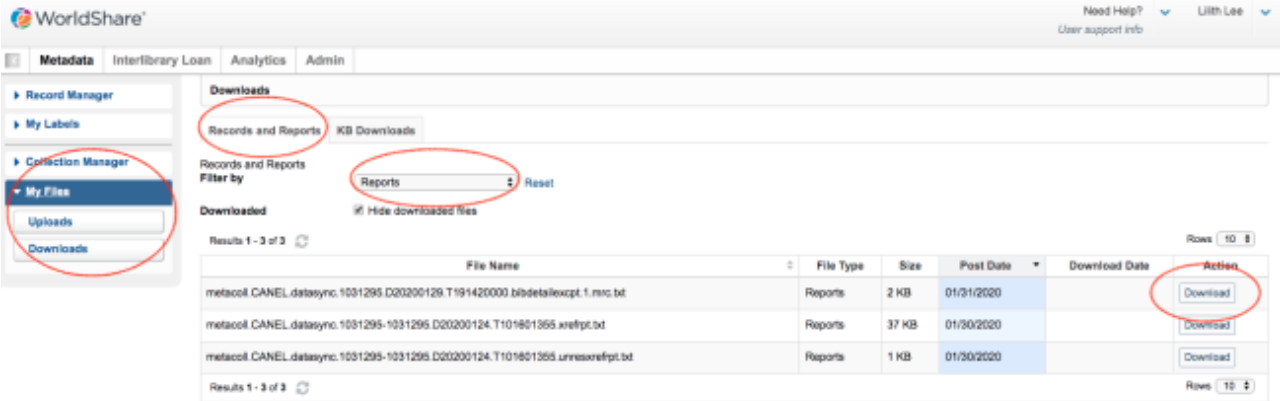
Field 001 (which contains the Drupal NID) is used as LSN for OCLC. This field is used by OCLC as the

Local System Number (LSN) to produce Unresolved Cross Reference and Bibliographic Cross Reference reports that list each OCLC control number across from the LSN. This information can be used to index the OCLC numbers in our local system. Indexing the OCLC control number links our library's records to other WorldCat services (e.g. WorldCat Discovery).

## Check Reports

After the file upload, it will usually take OCLC 48 hours to process it. If the Reports are present, then it means the upload was successful. To check the reports:

1. Log into [OCLC WorldShare](#)
2. Go to Metadata > My Files > Downloads > Records and Reports, and choose Filter by Reports



3. If the file has been processed, you will see the reports available for download
4. Download the text files and open them in Excel, consult [OCLC Data sync reports](#) and/or [My Files reports](#) for instructions on how to read them
5. If there are errors listed in one of the reports, read the following section

## Edit Uploaded Records in WorldShare

If there are only a few records with error, it is easy to edit them in WorldShare.

1. In the following example, there is an error in field 040\$b

A	B	C	D	E	F
Report Name: Bibliographic (Bib) Exception Detail - Data Synchron					
Institution Symbol: CANEL					
Collection ID: 1031295					
Data Sync File Name: CANEL-CANEL.1031295.IN.BIB.D20200124.T					
Date Completed: 20200129					
Incoming OCLC Number	Final OCLC Number	Local System Number	Exception Count	Data Sync Exception Description	Bib Validation Error
0	1137826703	BVNNELS202519	1	Invalid code in 1st \$b in 1st 040.	Critical
0	1137846169	BVNNELS202420	1	Invalid code in 1st \$b in 1st 040.	Critical
0	1137860267	BVNNELS202417	1	Invalid code in 1st \$b in 1st 040.	Critical
0	1137823962	BVNNELS202414	1	Invalid code in 1st \$b in 1st 040.	Critical

- Note the OCLC call numbers in the report
- Log into [OCLC WorldShare](#)
- Go to Metadata > Record Manager and enter the OCLC number in Term(s) to look for the record

WorldShare®

Metadata Interlibrary Loan Analytics Admin

**Record Manager**

Search

Data Type

Bibliographic Records

Scope

All WorldCat

Index

Keyword

Options

Term(s)

1137860267

Expanded Term(s)

Search Clear

Advanced Search

Close All Tabs

Search: Keyword = 1137860267 (All WorldCat)

Search: Keyword = 1137846169 (All WorldCat)

Search: Keyword = 1137826703 (All WorldCat)

Pimsleur Japanese level 2 comprehensive : learn ...

Pimsleur Japanese level 4 comprehensive : learn ...

Pimsleur Japanese level 2 comprehensive : learn to speak and understand Japanese with Pimsleur Language Programs. (1137860267)

Details WorldCat Holdings Copies (0)

Actions

View/Edit Metadata

View in WorldCat Discovery

OCLC Number: 1137860267

Title: Pimsleur Japanese level 2 comprehensive : learn to speak and understand Japanese with Pimsleur Language Programs.

Author: Pimsleur (Firm); Program, Pimsleur Language

Edition: Unabridged.

Publisher: New York, Prince Frederick, Md. Pimsleur, Distributed by OneClick Digital 2016

Publication Date: 2016

Physical Description: 1 online resource (1 MP3 file (290.82 MB))

Language: eng

Format: eAudiobook

Libraries Owning Item: 1

Language of Cataloging: **jap** error

Encoding Level: M

Cataloging Agency: CANCEL

Transcribing Agency: CANCEL

- Once the record is retrieved, click Actions and choose View/Edit Metadata
- Go to the corresponding field, in this case 040, and make the correction. In this example, we replace "jap" with "jpn" in subfield \$b

Metadata Interlibrary Loan Analytics Admin

Search Clear

Advanced Search

Close All Tabs

Search: Keyword = 1137846169 (All WorldCat)

Search: Keyword = 1137826703 (All WorldCat)

Pimsleur Japanese level 4 comprehensive : learn ...

Edit MARC 1137846169

Edit MARC 1137826703

Create Record

Record Work Lists

Export Lists

Toolbox

User Preferences

Request ID(s)

AHD-NVSH-SSU

87N-U2ME-TC2

9WH-60QV-MET

Copy Request ID(s)

My Labels

Collection Manager

My Files

Edit 1137846169

1 of 1

Print Edit Record Advanced Action Save

Add Record to WorldCat

Add Record and Set WorldCat Holding

**Replace Bibliographic Record**

Save and Lock Bibliographic Record

Save In-Progress Record

001 1137846169

005 202001292227423

008 121004s2016 xx nnn

006 m h

007 or |||||

040

CANEL\$jpn\$cCANEL

090

\$b

- When you are done, click Save and choose Replace Bibliographic Records

# See this page for instructions on how to fix unresolved records

Go to this OCLC link and scroll to the bottom where it says, "Fix unresolved records through WorldShare Record Manager"

[https://help.oclc.org/Metadata\\_Services/WorldShare\\_Collection\\_Manager/Data\\_sync\\_collections/Reference/WorldCat\\_data\\_sync\\_collections\\_Process\\_records\\_in\\_WorldCat\\_Staging?sl=en](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/Reference/WorldCat_data_sync_collections_Process_records_in_WorldCat_Staging?sl=en)

## Past Uploads

Please keep a record of each upload. Note the filename for preparing next upload. For example, to prepare for the next upload after the one on September 11, 2020, you should follow the filename and export from Drupal the new records added on/after September 4, 2020.

Upload Date	No. of records	Filename	Note
2019-01-27	37,926	1031295.CANEL.20190127.mrc	
2020-01-24	1,776	1031295.CANEL.20200222.mrc	error in filename, next export starts from Jan. 22, 2020
2020-07-24	38	1031295.CANEL.20200724.mrc	exporter error
2020-09-11	2,391	1031295.CANEL.20200904.mrc	
2021-03-26	4,751	1031295.CANEL.20210326.mrc	
2021-08-30	8,499	1031295.CANEL.20210830.mrc	may be duplicates from 2020-03-26 to 2021-03-26
2022-03-18	2,671	1031295.CANEL.20220318.mrc	
2023-02-09	6,269	1031295.CANEL.20230209.mrc	

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