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Comparing ILS and WorldCat records

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Israel Yanez, Adjunct Librarian, Technical Services
Los Rios Community College District
yanezi@losrios.edu

Background: The LSP plans to populate the Network Zone (NZ) with master WorldCat records. Libraries that have enhanced bibliographic records locally in their ILS, and not at the WorldCat level, may lose metadata in non-local fields (e.g. 505, 520, 586 fields). The process below describes how to identify corresponding WorldCat records that lack the locally added non-local MARC fields.

General Workflow

1. Identify records in your ILS that contain the field. In Sierra, use Create lists.
2. Export those records, or just the OCLC number field, from your ILS to your desktop. In Sierra go to Review Files, Export Records. The end result should be a text file with one OCLC number per line.
3. In Connexion Client, batch search WorldCat using those OCLC numbers.
4. Batch export (**to a file**) those records.
5. In MarcEdit, use Select Records for Edit to identify those that are missing the field. Compile those records into a .mrc file.
6. Work through the newly created .mrc file of records to enhance the WorldCat records. Alternatively, use MarcEdit's Export Tab Delimited tool to create a spreadsheet of selected fields.

Procedures

Identify records in your ILS

1. In Sierra, use Create Lists to gather records containing the specific MARC field, e.g. 586

2. Export the OCLC numbers from that list.
   a. In Create Lists, select your review file.
   b. Click on the **Export Records** button.
   c. Line 1- Type =b, Field = MARC Tag 001
   d. Click on the **Browse** button to navigate to the location on your computer where you want to save the text file. Name your file.
   e. Click on **Save.**
   f. Click on **OK.**

   Note: Since we're only exporting one field from the records, there is no need to specify any field

> *or repeated field delimiters.*

3. Your text file should have a header and a list of OCLC numbers.
   a. Remove the first line -- "001"
   b. Since your OCLC numbers may be enclosed in quotes, do a find the quotes in your text file and replace with nothing.
4. You should now have a text file with only OCLC numbers.

Batch Search in WorldCat

Create a local save file

In Connexion Client, you can use the default local bib save file, if it's empty. Preferably, and to ensure your records get saved to an empty local save file, you can create one specifically for this project.

1. Create a local save file.
   a. Go to **File**, **Local File Manager**.
   b. Click on the **Create File** button.
   c. Name your file, e.g. **586Project**
   d. Click on the **Open** button.
2. From the list of local files, select your newly created file and click on the **Set as Default** button.
3. You should now see a red check mark immediately to the left of your save file.
4. Click on **Close**.

Enter Bibliographic Search Keys

Import the OCLC numbers into Connexion to then later process the batch search.

1. Go to **Batch**, **Enter Bibliographic Search Keys**.
2. Ensure that the Local File defined is your newly created default local file.
3. From the **Use default index** drop-down menu, select **OCLC Number (no:)**.
4. Click on the **Import** button.
5. Find and select the text file with the OCLC numbers from the Sierra records.
6. Click on **Open**.
7. Do you want delete your original import file? Clicking on **Yes** will delete the text file from your computer. If you'd rather keep the text file, click on **No**.
8. Click on the **Save** button.

Process Batch Search

Now that the OCLC numbers have been imported and saved as bibliographic search keys, you can process the batch search.

1. Go to **Batch, Process Batch**.
2. In the **Local Files** area, check the box next to your default local file.

3. In the **Process** area, check the box for **Online Searches**.
4. Click on **OK.**
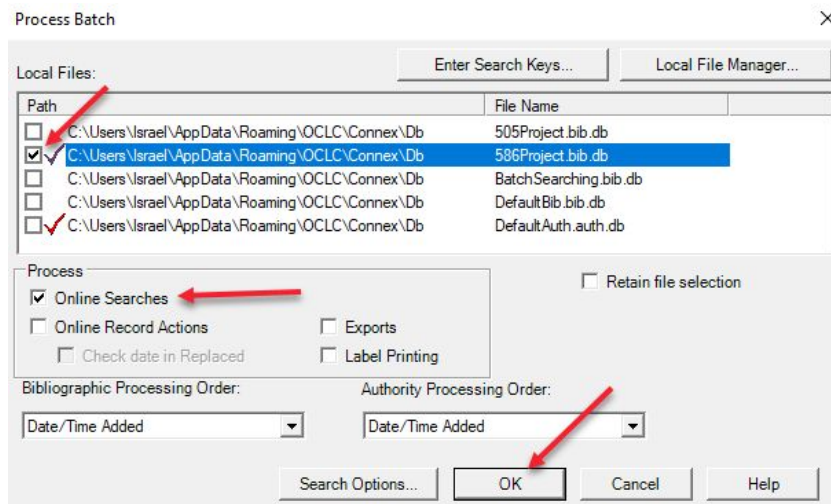
5. The batch search process will begin and may take a while, depending on the number of OCLC numbers you imported. You may want to work on something else in the meantime.
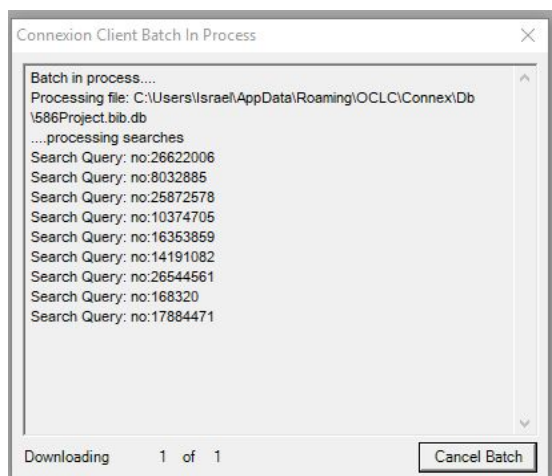
6. You should see a **Batch Search Report** when the batch search process is finished.

IMPORTANT: There is a limit of how many records can be saved to a local file. If you have more than 10,000 records to batch search/export, split the records into sets of less than 9,999 and run the batch search/export process multiple times.

Batch export

Before continuing with these steps, you may want to check the terms of your OCLC contract, or check in with your OCLC representative to ensure that you are not being charged per export.

Define your export destination.

1. Go to **Tools**, **Options**.
2. Click on the **Export** tab.
3. In the **Destination** area, click on **File:(Prompt for filename)**.
4. Click on the **Apply** button.
5. Click on the **Close** button.

Now that you've defined the export destination and your records are in the local save bibliographic file, you can batch export them to a file.

1. Click on **F3**.
2. Ensure that the local file is your default local file.
3. Leave the **Search for:** box blank and click on **OK**.
4. Connexion Client should be displaying all the records in your local save file.
5. Right-click anywhere in the display of records and click on **Select all**.
6. With all the records selected, click on the Export icon
7. Select the destination on your PC where you want to save your .mrc file.
8. File name: Name your file, e.g. **Has586inSierra-WorldCatRecords.mrc**
9. Files of type: **All files (*.*)**
10. Click on **Open**.
11. The file should be created in the selected destination folder.

Identify WorldCat records lacking field

These steps assume you have downloaded, and are comfortable using, MarcEdit. In this example, we'll be identifying records that lack MARC 586.

1. Open the file in MarcEdit.
2. With the .mrk file open in the MarcEditor and the MARC records displaying, go to **File**, **Select Records for Edit**.
3. In the **Display Field** box, type **586**.
4. Click on the **Import File** button.
5. MarcEdit should display record numbers and the values of the display field 586. Record number rows that show the value Display field not found represent records that lack the field.
6. In the search box, type **Display field not found** and click on the search icon.
7. A box pops up telling you how many records have been selected.
8. Click **OK**.
9. Click the **Export Selected** button.
10. The MarcEditor should be displaying records that lack a 586 field.
11. Go to **File**, Compile file into **MARC**.
12. Name and save your MARC file.

Enhance WorldCat records

Work through the newly created .mrc file of records to enhance the WorldCat records. Alternatively, use MarcEdit's Export Tab Delimited tool to create a spreadsheet of just the fields you need to identify the records in

WorldCat to do this work (e.g. OCLC number, Author, Title). Below are instructions for using the **Export Tab Delimited** tool. In this example, we will include the 035, 100, and 245 fields.

Note: If you are not a PCC library, you won't be able to replace PCC records.

1. Open MarcEdit.
2. Click on the **Export Tab Delimited** icon.
3. If you don't see the **Export Tab Delimited** icon, go to **Tools**, **Export**, **Export Tab Delimited Records**.
4. Under **Set File Paths,** click on the folder icon next to the first box. Find and select your .mrc file of WorldCat records that lack the field.
5. Click on the second folder icon (with the green down arrow).
6. Select the folder destination and name the text file this process will create.
7. Click on **Save**.
8. Leave the default field delimiter settings as they are.
9. Click on **Next**.
10. Check the **Normalize field data** box. This will exclude the subfield delimiters and subfield delimiter values, and make your data more readable.
11. Place your cursor in the **Field** box and type **035**.
12. In the **Subfield** box, type **a**.
13. Click on **Add Field**.
14. In the **Define Fields/Subfields to Export** box, you should see **035$a**.
15. Repeat steps 11, 12, & 13 for: **100$a** and **245$a**.
16. You should see something like the screenshot below.
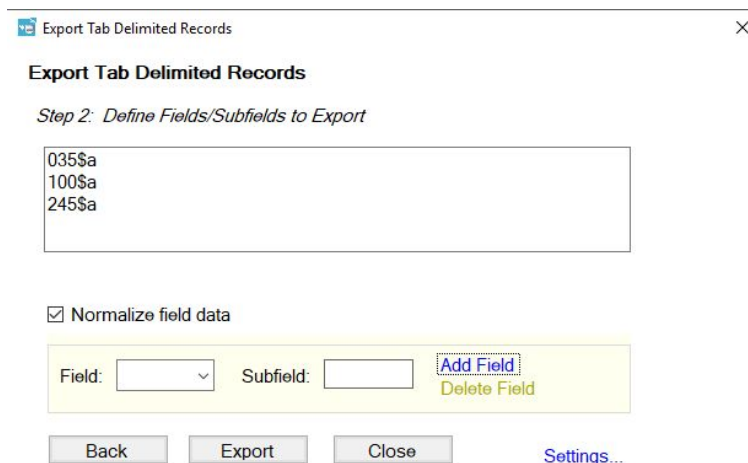
17. Click on the **Export** button.
18. You should get a message telling you the items have been exported to the file.
19. You can now export your tab delimited file in Excel.