Reclamation Project Instructions
April 6, 2020

Background

The Reclamation Project is a one-time effort that accomplishes two goals:

1. Where possible, it will match records currently in your Institution Zone that lack OCLC numbers to WorldCat records and replace your record with the current WorldCat record. This will allow you to get more benefit from our Network Zone.
2. It will get your library's holdings current in WorldCat. For new OCLC libraries, your holdings will be added. For continuing OCLC libraries, inconsistencies that have accumulated over the years will be corrected.

Your Reclamation file should include all bibliographic (MARC) records that you wish to contribute to the Network Zone and for which you wish to have holdings set in WorldCat.

Reclamation Processing

The Reclamation files will all be processed using data sync collections created under CCC's group OCLC symbol, **CCCLS**. Your institution will be assigned a collection ID to use for your Reclamation file, and a date on which you should send the file for processing. If the date does not work for you, please let us know as soon as possible so that we can adjust the schedule. Note: If you are a multi-library Alma institution (such as a district) with multiple OCLC symbols, you should send a single file containing all the records for every library in the institution.

Naming the Reclamation Files

Your Reclamation file name must be unique and will be provided in this spreadsheet in column D, File Name. As OCLC creates Collection IDs, the filenames will be added.

Sample Reclamation File Name:
XXXXXXX.CCCLS.*LibraryA*.mrc – where XXXXXXX is the assigned collection ID. *LibraryA* should be replaced with unique identifying information for your library. Example: *1234567.CCCLS.Chaney.mrc*

<u>Uploading your Reclamation file to OCLC - Step-by-Step Instructions</u>

Create a Set in Alma:

In Alma IZ, search the repository:

1. Create Search Query that will export records to be included in the reclamation project.
   a. These are the records an institution wants to have holdings in WorldCat.
   b. The query should exclude records that are not intended to be housed in the Network Zone. For a list of these, see the LSP policy <u>Primary Bibliographic Utility</u>. If you have locations that are composed entirely of such records, you will exclude these when building the query.
   c. The library will need to create an Advanced search query for the Managed Set used in exporting records.
2. Start with Physical Titles> Keywords
3. Click on Advanced
   a. Start adding fields
   b. *See screenshot below for example query
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5. Start with Physical Titles> Keywords
6. Click on Advanced
   a. Start adding fields
   b. *See screenshot below for example query
   c. The libraries in a district can export in one file.
   d. Choose the library and locations to be included in the export file. This will include the different libraries and the locations to be exported. (Permanent Physical Location)
      Libraries that have multiple locations but they are all under one OCLC symbol, one file will also be exported. Choose library and locations to be included in the export file (Permanent Physical Location).
   e. Do not exclude records that already include OCLC numbers.
   f. Once you have a query you believe is returning records you want to send to OCLC, Save the Query. You may review the query, modify the search fields, and resave until you have a query you are satisfied with.
   g. This is the set you will use to Export the .mrc file.

      h.   There is a test query set up in each instance, Test Query for OCLC, that can be used to begin the query process for the library.

Exort .mrc records from Alma

You can create a .mrc file from a set of bibliographic records in Alma by performing the following steps: **If your library has not created a set for the export job, please see Create a Set below. (SUNY has good instructions for creating a .mrc file.)

1.   Go to Admin>Manage Jobs and Sets>Run a Job
2.   Search by Name for the following job: Export Bibliographic Records
3.   Click on the radio button next to the "Export Bibliographic Records" job
4.   Click Next
5.   Click on the radio button next to the set you want to export
6.   Click Next
7.   Enter Task Parameters
   - a. Physical format: Binary
   - b. Output format: MARC21 Bibliographic
   - c. Number of records in a file: One
   - d. Expand routine: Add Holdings Information
   - e. Export into folder: Private
     - i. This allows the file to be downloaded from the job history
8.   Click Next
9.   Review job
10.   Click Submit
11.   Download the .mrc file
    - a. Got to Admin>Manage Jobs and Sets>Monitor jobs
      - i. Skip this step if you are already monitoring the job
    - b. Click on the History tab
    - c. Click Report from the ellipses for the job
    - d. Click on the "Link to Export Records" link
    - e. Click Download from the ellipses of the report
    - f. Use filename listed in the OCLC spreadsheet to name the export file = OCLC symbol
    - g. Go to SFTP instructions below

SFTP file to OCLC

Use a SFTP Client on desktop, such as FileZilla.

Use this directory to Upload files: SFTP files to: /xfer/metacoll/in/bib
Upload your exported .mrc file to OCLC
Using SFTP client: If you use an FTP client, adapt the information below as needed. See Exchange files with OCLC for an example of an FTP client.

1. If using FileZilla: host: sftp://filex-m1.oclc.org port 22
    a.Username= fx_cccls
2 .Enter your institution's assigned password: PW= aH4SlJ-c [lower case "L" after "S"]
3. Navigate to directory: /xfer/metacoll/in/bib
4. Only send the file once. The file will disappear quickly from the directory.
5. Quit
6. Email Jessica when file is in OCLC directory

Screenshot example for building an Advanced Query:

This is an example to start with, it doesn't have to be exactly like this. The permanent physical location needs to include each library in the district. The holdings will be picked up in the export process. ***OCLC needs to do a comparison when doing the reclamation. *Do not exclude records with OCLC numbers.* CUNY Reclamation information