Inventory: Importing and Overlaying MARC Bibliographic Records from OCLC

Create a new instance record

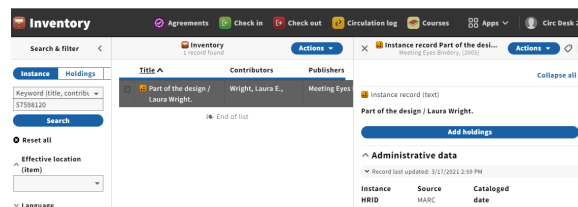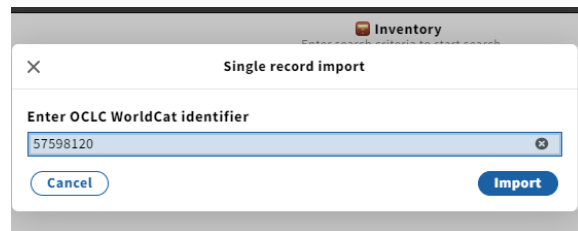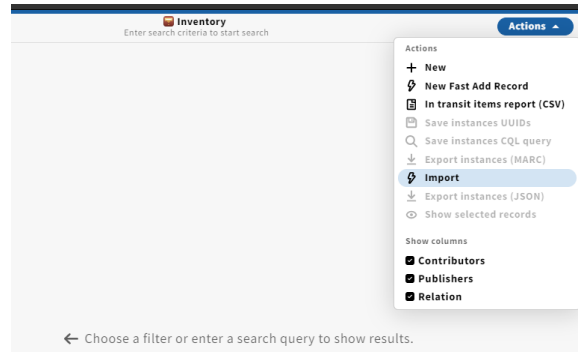Preconditions: a record to use has been identified in OCLC

Steps:

1. In the default pane or middle pane "Actions" menu, select "Import"
2. Enter the OCLC number of the record to be used (tip: copy & paste the record from OCLC Connexion)
3. Click on "Import"
4. A green "success" "toast" will appear briefly
5. Go to Actions>View Source to check if 035 with the OCLC control number appears. If not, input manually or use macro '//035' to add OCLC control number in QuickMARC. Add \\ to both indicators.

   ex.: 035 \\ $a (OCoLC)XXXXXXXX

   You can use the OCLC number in the keyword or identifier search to retrieve the new record

Expected results:

An instance record is created with underlying source "MARC" based on the OCLC record

Overlay an existing instance record

Preconditions: an instance record exists in Inventory; a record to use has been identified in OCLC

In this example shown on the right, the existing Instance has no underlying MARC; this functionality is the same regardless of the source of the existing record

Steps:

1. Navigate to the Instance record in Inventory you wish to overlay
2. In the upper right "Actions" menu, select "Overlay"
3. Enter the OCLC number of the record to be used (tip: copy & paste the record from OCLC Connexion)
4. Click on "Import"
5. It may take a few minutes for the changes to display

Expected results:

The Instance HRID remains the same, and the Instance record is updated based on the new underlying MARC data from the OCLC record

Note that there is not currently an option to "merge" and protect some existing fields

Troubleshooting

See Viewing Data Import Logs for tips on troubleshooting single record import

If you mistakenly import a new record when you meant to overlay an existing one, you'll need to mark the mistakenly created record for deletion. Follow the steps outlined in Inventory: Deleting Instance Records