

Inventory: Importing and Overlaying MARC Bibliographic Records from OCLC

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Create a new instance record

Preconditions: a record to use has been identified in OCLC

Steps:

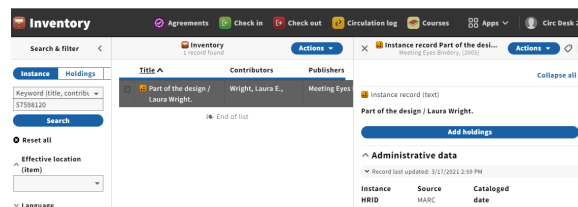
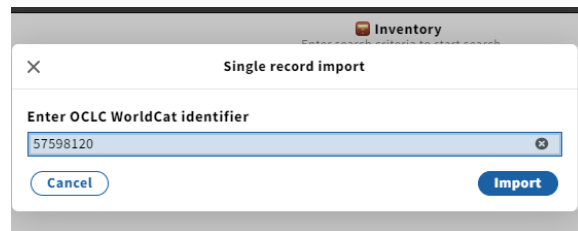
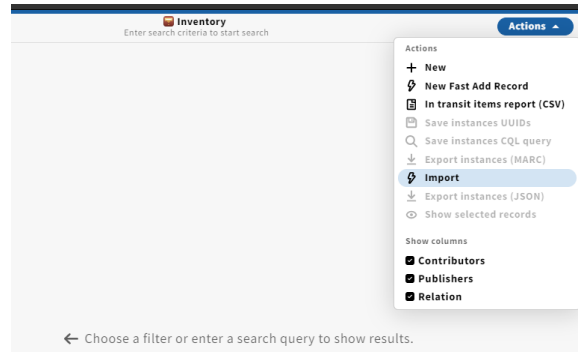
1. In the default pane or middle pane "Actions" menu, select "Import"
2. Enter the OCLC number of the record to be used (tip: copy & paste the record from OCLC Connexion)
3. Click on "Import"
4. A green "success" "toast" will appear briefly
5. Go to Actions>View Source to check if 035 with the OCLC control 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)XXXXXXX

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

Instance record Test record, title

Instance record (text)

Test record, title

Add holdings

Administrative data

Record last updated: 3/17/2021 2:39 PM

Instance HRID	Source	Cataloged date
38	FOLIO	-

Instance status term	Instance status code	Instance status source
Uncataloged	uncat	folio

status updated 3/17/2021, 2:39 PM

Mode of issuance

-

Statistical code type	Statistical code
-	-

Title data

Resource title

Test record, title

Alternative title

tuna

Instance record Test record, title

Instance record (text)

Test record, title

Add holdings

Administrative data

Actions

- Edit
- Duplicate instance record
- Move items within an instance
- Move holdings/items to another instance
- Overlay

Single record import

Enter the OCLC WorldCat identifier to be used to overlay the current data

2878528

Cancel Import

Instance record Test record, title : used to produce test cards / by OCLC

Instance record (text)

Test record, title : used to produce test cards / by OCLC.

Add holdings

Administrative data

Record last updated: 3/17/2021 2:49 PM

Instance HRID	Source	Cataloged date
38	MARC	-

Instance status term	Instance status code	Instance status source
Uncataloged	uncat	folio

status updated -

Mode of issuance

single unit

Statistical code type	Statistical code
-	-

Title data

Resource title

Test record, title : used to produce test cards / by OCLC.

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](#)