OCLC Connexion Browser Guides

Export and Import Bibliographic Records

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Revision History

Date	Section title	Description of changes
November 2005	5. Import bibliographic or authority records	Added new information about downloading records from Product Services Web and handling unresolved batchload records.
November 2006	1. Set export options	Added new option to delete fields on export for bibliographic and authority records.
	2. Export bibliographic records	Updated to reflect new option to delete fields on export.
May 2007	1. Export options	Added information about a new option to set export validation level for institution records attached to master bibliographic records.
May 2014	All	Updated content on file aging. Records in the saved file are no longer purged from the saved file. Only locked master records have a 14-day expiration date. After the expiration date, the master records are retained in the save file.
May 2016	1. Export options	Removed all references to institution records.
June 2021	All	Replaced references to "master records" with "WorldCat records."

Table of Contents

1   Set export options

About export options
- **Export methods.** You can export bibliographic records or authority records to a file on the Connexion server, and then download the file to your workstation. Or you can export records directly to your local system via a TCP/IP connection.

    - **Records.** You can export bibliographic records retrieved from WorldCat or the bibliographic save file. You can export authority records retrieved from the Authority File or authority save file.

    - **Single or batch export.** With either export method, you can export one record at a time or export a group of flagged records.

    - **Formats.** You can export bibliographic records in MARC, in Dublin Core HTML, or in Dublin Core RDF using either export method. For export to a local system, verify which formats your local system can accept. You can export authority records in MARC format only.

    - **Validation for bibliographic records.** You can choose to have Connexion validate all exported bibliographic records (the default setting), or you can turn off automatic validation for exported records.

Go to Export Options screen

	Action
1	On the General tab, click **Admin**.
2	At the Preferences screen, click **Export Options**.

Save changes, cancel, or restore original defaults
- When finished viewing and/or changing options on this screen, use the buttons at the top and bottom of the screen to take an action.
- The following table describes how the buttons work.

Button	Purpose/Result
Go Back	Return to the previous screen.
Save for Session	Save changes on this screen for the current session only. When you log off, the system restores your previous default settings.
Save My Default	Save changes on this screen for the current session and future sessions. The new settings remain in effect until you change them.
Reset	Restore original Connexion settings for options on this screen. Reverse any changes you made during the current session or in previous sessions.
Cancel	Reverse any changes you made since you accessed this screen during the current session. Your previously saved settings remain in effect.

Format for exporting flagged bibliographic records	**Why use this setting?** Select a format to export groups of flagged bibliographic records in your preferred format automatically, without selecting a format at the time of export.

Action	Result
On the Export Options screen, under Flagged Bibliographic Record Export Format, • Select **MARC** or **Dublin Core HTML** or **Dublin Core RDF**. Or • Keep the original default setting, **None**.	**Format specified.** When you export f lagged bibliographic records, the system uses the selected format automatically. **None (original default setting).** When you export f lagged records, the system displays a screen that prompts you to select an export format.

Validate exported bibliographic and authority records	• Choose the level of validation for a single exported bibliographic record, bibliographic institution record, and/or authority record. • Validation levels apply only when you export a single WorldCat bibliographic record, bibliographic institution record, or authority record. Connexion does no validation when you export multiple records • **Validation increases time required for export.** When you choose to validate exported records, exporting takes longer to complete.

Action	Result
On the Export Options screen, under Validate Exported Bibliographic and Authority Records, select the validation level for each record type. Keep the default setting, **None**, or select **Basic** or **Full**. **Default setting** None.	• **None** (default setting). No validation for exported records. • **Basic** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full** Verifies record structure (as for basic validation) and also checks relationships between elements. **Note:** When you choose Basic or Full validation for exported bibliographic records, Connexion changes each record's Validate status and Export status as appropriate. Records that f ail validation cannot be exported until you correct the errors identified.

Save records marked for export (bibliographic records only)	• **Why use this setting?** When you want to export a group of bibliographic records at once, use the Mark for Export action to mark each record as ready for export.

- However, to do batch export, you must save the records. Only saved records can be retrieved by searching for the **Export - Ready** status, flagged, and exported as a group.

Action	Result
On the Export Options screen, under Mark for Export and Save Record, • Select **On** or **Off**. Or • Keep the original default setting, **Off**.	• **On**. If you select **On**, Connexion saves each bibliographic record that you mark for export. • **Off**. (def ault setting) If you select **Off**, Connexion does not automatically save bibliographic records marked for export.

Specify fields to delete from exported bibliographic or authority records

Action	Result
Fields to Delete on Export (Optional) Specify the fields you want to remove f rom each bibliographic and/or authority record before exporting the record for local use. On the Export Options screen, under Fields to Delete on Export, separate text boxes let you specify fields to remove f rom each record type. In either text box, type the 3-digit MARC tag numbers for the fields to delete.	• To delete a single field, type the tag number in the text box. • To delete a range of fields, type the f irst and last tag to be removed, separated by a hyphen. • Separate single tags and tag ranges with commas. **Example:** In the Bibliographic Records text box, type 920, 938, 945-999 to remove fields 920 and 938, and f ields 945 through 999, f rom all exported bibliographic records.

Export to a file (default setting)

- Use export to a file if you have **not** set up a direct TCP/IP connection from OCLC Connexion to your library's local system.

- **Export files:**

  —Are created and stored on the Connexion server.

  —**Allow appending until downloaded.** You can continue exporting to the same file until you download the file.

  —Contain records in **one format**. Separate export files are created for authority records. If you export bibliographic records in more than one format, such as MARC and Dublin Core HTML, the system creates a separate file for each export format used.

—Contain records of a specific format that are exported either by any user from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file type is **Institution**. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to **Individual**.

—Remain available for download for 30 days from the file creation date. After 30 days, the system automatically deletes export files.

- **Exported authority records.** If you export authority records, the Download Export Files screen includes a separate list for authority record export files.

	Action	Result or Note
1	On the Export Options screen, under Export Destination, select **Export to a File**.	• When you export records, the system adds the records to a file on the Connexion server. • Until you download the file, records you export are added to the export file. • To use the exported records, download the export file to your workstation.
2	**Optional.** Specify a file name for downloaded export files. • On the Export Options screen, under Export File Name, type the file name and extension in the **File Name** text box. • Or keep the default file name, **export.dat**.	• **Name specified.** When you download an export file from the Download Export Files screen, the system automatically supplies the specified file name and extension. • **Default name.** If you do not specify a file name, the system supplies the default name, **export.dat**. • **Change name or extension during downloading.** If necessary, you can change the supplied file name before saving the file.
3	**Optional.** Specify the type of export file to use. On the Export Options screen, under Export File Type, select **Institution** (default setting) or **Individual**. **Note:** This setting determines how records accumulate in each file. Regardless of this setting, Connexion checks for record format and creates a separate export file fore each format.	If you select: • **Institution export file (default setting).** Connexion creates export files that contain records exported by anyone logged on with an authorization number linked to your library's OCLC symbol. • **Individual export file.** Connexion creates export files that contain records exported by a user logged on with a specific authorization number.

Export to local system via TCP/IP

- Your local system must be able to accept records directly via TCP/IP.

- If your site uses a firewall to isolate internal systems from the Internet, you must provide a port that allows OCLC Connexion to access your local system through the firewall.

- Your site's firewall system must recognize and accept export data sent by the server from the following IP address: 132.174.100.234. If you have questions about firewall requirements for TCP/IP export, contact OCLC Customer Support.

  E-mail a support question: To e-mail questions to Customer Support, at the top right corner of the Connexion browser screen, click **Contact**. Select **Problem/Question** as the message type and select **OCLC Support** as the recipient.

	Action	Result or Note
1	On the Export Options screen, under Export Destination, select **Export to a TCP/IP Connection**.	When you export records, the system sends each record directly to your local system via a TCP/IP connection you specify.
2	Under TCP/IP Connection Options, complete both items: • **Host Name.** Type either the **TCP/IP** name (example: **lib.domain.edu**) or the numeric **TCP/IP address** of the host computer that runs your local system. • **Port Number.** Type the number of the port at your site that provides direct access to your local library system.	**Firewall setup.** If your local system is behind your site's firewall, complete the following steps: 1. Specify a host name/address and port number that provide access to your local system through the firewall. 2. Configure the firewall software to recognize and accept data from the following IP address: 132.174.100.234. 3. The **port range** is the same for any IP address: 30000-30499.
3	Under TCP/IP Host Settings, select one or both of the options if required for your local system. **Default setting:** both check boxes cleared, options not selected.	**Permanent Connection** Select the check box **Notify Host before Disconnect** Select the check box

	Action	Result or Note
4	Under TCP/IP Timeouts and Retries, accept the def ault values unless your local system requires that you change the.	**Timeout** Specif y how long (in seconds) the system should wait for a response f rom your local system bef ore abandoning the attempt to connect. **Retries** Specif y the number of times the system should retry to connect to your local system af ter a f ailed attempt. **Delay** Specif y how long (in seconds) the system should wait af ter connecting to the local system bef ore transmitting data to the local system.
5	Under TCP/IP Local System User Inf ormation, • Supply the inf ormation your local system requires for authentication (Logon ID, Password, and/or User ID). • Select the appropriate check box(es) to have the system send the inf ormation you supplied when requesting access to your local system.	

TCP/IP export options:
definitions

TCP/IP setting	Definition	Notes
Host Name	• IP address or IP name for the local system host. • **IP address**. Internet Protocol address. Also ref erred to as the Internet address. A unique address for a machine in a TCP/IP network. It is a 32-bit address comprising four 8-bit segments, each separated by a period (.). Each 8-bit segment is a number from 0 to 255. • **IP name**. Internet Protocol name. A unique name for a machine in a TCP/IP network that you can use in place of the machine's IP address. It comprises at least two segments, each separated by a period (.).	
Port Number	• Port number on the host to which you want to export records. • **TCP/IP port**. A TCP/IP software channel through which other machines on a TCP/IP network communicate with a TCP/IP host for specified services.	**Firewalls** If your site uses a f irewall to isolate internal systems f rom the Internet, the port number for export to your local system must provide a path through the f irewall, directly to your local system.
Permanent Connection	If your local system disconnects you af ter each export, select this check box to stay connected.	
Notif y Host bef ore Disconnect	• If your local system requires that you notify it bef ore you disconnect, select this check box. • When this box is selected, the system sends a notif ication message to your local system bef ore disconnecting.	

TCP/IP setting	Definition	Notes
Timeout	• Specify the number of seconds to wait for local system response. There is no upper limit. • When the specified time expires, the system considers the export to have failed and closes the TCP/IP export destination.	
Retries	• Specify the number of times to retry connecting to the local system if the first try fails. • There is no upper limit.	
Delay	• Specify the number of seconds to wait after connecting to the local system before transmitting data to the local system. • There is no upper limit.	
Send Logon ID	• Select this check box to send the logon ID and password before each export to the local system. • Enable this setting only if your local system vendor specifies it.	
Logon ID	If your local system requires a logon ID before each export, type the local system logon ID in this text box.	
Password	If your local system requires a password for authorization, type the password in this text box.	
Send User ID	Select this check box to send the user ID before each record exported to your local system.	
User ID	If required for your local system to process the export, type ID of the user authorized to export records.	

2 Export bibliographic records

Why export bibliographic records?

- **Add records to your library's local catalog.** Connexion's MARC export format works well with many local systems. You can also export Dublin Core records in either HTML or RDF XMLformat.

- **Create Dublin Core metadata for your library's Web pages.** View and/or export a single record as DC HTML (Dublin Core descriptive information within HTML <meta> tags) or DC RDF (Dublin Core descriptive information within an RDF-compliant XML document) and embed the text within the <head> section of the Web page. Or export a group of related records as DC HTML or DC RDF.

Records you can export

- **Single bibliographic record** in MARC, Dublin Core HTML, or Dublin Core RDF format. This function is available when you display or edit the record in the appropriate view.

- **Multiple records** in MARC, Dublin Core HTML, or Dublin Core RDF. This function is available when you flag records you want to export.

- **More than 100 records per export action.** You can export more than 100 records at once. However, to prevent timeout problems that can occur with larger batches, Connexion browser pauses after exporting 100 records and asks you to confirm that you want to continue processing the flagged records.

- **One format per export.** For each export action, you can select one format (MARC, DC HTML, or DC RDF). You cannot export multiple records in different formats with one action.

- **Records retrieved from:**
  —WorldCat
  —Bibliographic save file

- **Saved records.** You can export **saved** records **only** if the records exist in WorldCat (that is, the records have OCLC control numbers). You **cannot** export a new record not yet added to WorldCat.

Validate exported bibliographic records

- You can choose the level of validation applied for exported bibliographic records. On the Export Options screen, under Validate Exported Bibliographic and Authority Records, select **None** (default setting) or **Basic** or **Full**.

- The setting applies when you export a single bibliographic record.

- **Validation increases time required for export.** With validation on, exporting takes longer to complete.

Action	Result
On the Export Options screen, under Validate Exported Bibliographic or Authority Records, select **None** or **Basic** or **Full**. **Note:** You can also set the validation level on the Cataloging Options screen under **Validation Levels**. If you change the setting on either screen, it changes automatically on the other screen.	• **None** (def ault setting) Connexion does not validate exported authority records. • **Basic** Checks the validity of elements, length, repeatability, type of data or codes, and other aspects of MARC record structure. • **Full** Verifies record structure (as for basic validation) and also checks relationships between elements. **Note:** Records that f ail validation cannot be exported until you correct the errors identified.

Export methods

Export method	What you need to know to use it
Export to a f ile on the Connexion server	**How it works** When you take an export action (on one record or a group of records), the system creates a f ile on the server that contains the record(s). **How to use it** This is the def ault export method. Unless you select the other export method (TCP/IP export), the system always exports records to a f ile on the server. **Append records to file** You can export records to a f ile and then append more exported records to the same f ile. The f ile remains open and accepts additional records until you download the file. **Download export files** When f inished exporting, download the export f ile to your workstation.
Export to a TCP/IP connection	**How it works** When you export records, the system sends each record directly to your local system via TCP/IP. **How to use it** To export directly to a local system, you must: • Specif y that you want to use TCP/IP export. • Supply the name of the host computer on which your local system is located, and the TCP/IP port to use when adding records to the local database. • Work with your system administrator to make sure your f irewall is conf igured to accept data f rom OCLC.

Select an export method

	Action
1	**Go to the Export Options screen** On the General tab, click **Admin**. At the Preferences screen, click **Export Options**.
2	**Specify export method** On the Export Options screen, under Default Export Destination, Select **Export to a File** Or Select **Export to a TCP/IP Connection**
3	**Complete TCP/IP export settings** If you select **Export to a TCP/IP Connection**, you must supply additional information. **Complete optional setup for export to a file:** For export to a file, no other settings are required. However, you can choose whether to create files that contain records exported by any user at your institution or by individual users. You can also specify a file name to be used when you download export files.
4	**Save as default or change for current session** ● To use your modified export options for the current session only, at the top or bottom of the Export Options screen, click **Save For Session**. Or ● To use the modified options as the default for future sessions, click **Save My Default**.

Specify fields to delete from exported bibliographic records

- You can have the system remove specific fields from each bibliographic record before exporting the record for local use.

- You use tag numbers to specify single fields and/or field ranges

Export single bibliographic record

	Action
1	Retrieve the record you want to export. You can export a record retrieved from WorldCat or the bibliographic save file.
2	(Optional) Change the record view. To export in MARC, the current view must be **MARC Template** or **MARC Text Area**. To export in DC HTML or DC RDF, the current view must be **DC Template** or **DC Text Area**. Open the View list and click the view you want.
3	• On the Action list click **Export Record in MARC** or **Export Record DC HTML** or **Export Record DC RDF**. Or • **MARC.** Press <Alt><K> and then <E> (or <Alt><J> and then <E>). • **DC HTML.** Press <Alt><K> and then <*> (or <Alt><J> and then <*>). • **DC RDF.** Press <Alt><K> and then <(> (or <Alt><J> and then <(>). **Results** • **Validation.** If you choose Basic or Full validation, Connexion validates each record before exporting. Records that fail validation cannot be exported until you correct the errors identified. • For **export to a file**, the system exports the record to a file on the Connexion server. The system creates a new file or, if an export file exists, adds the record to the open file. • For **TCP/IP export**, the system exports the record directly to your local system. • The system changes the record's Export status to **C** (Completed) or **F** (Failed).

Export multiple bibliographic records

More than 100 records per export action

- You can export more than 100 records at once.

- However, to prevent timeout problems that can occur with larger batches, Connexion browser pauses after exporting 100 records and asks you to confirm that you want to continue processing the flagged records.

Select format for exporting flagged bibliographic records

- **Why use this setting?** Select a format to export groups of flagged bibliographic records in your preferred format automatically, without selecting a format at the time of export.

	Action
1	Retrieve a set of records that includes records you want to export. You can retrieve records for export from WorldCat or the bibliographic save file. **Tips** ● **Save WorldCat records.** You cannot flag records in WorldCat for group actions such as export. You must save WorldCat records in the bibliographic save file, retrieve them from the save file, and then flag the records. ● **Use Mark for Export (Optional).** Before or after saving a record you plan to export, on the Action list click **Mark for Export** or press <Alt><K>and then <J>. The record's Export status changes to **R** (Ready). When ready to export a group of saved records, search the save file for records with the Export status **Ready**. ● **Note:** You must save the records in order to retrieve them by searching for the **Export - Ready** status. If your workflow involves marking records for export, you can have the system save records automatically when you take the **Mark for Export** action. On the Export Options screen, set the **Mark for Export and Save Record** option to **On** (default setting is **Off**). ● **Use My Status (Optional).** When you save a record for export, enter text in the **My Status** box (for example, **exp**) to distinguish the records. Then search the save file for the My Status text to retrieve only the records you prepared for export. **Note:** You can export saved records only if the records exist in WorldCat (that is, the records have OCLC control numbers). You cannot export new records not yet added to WorldCat.
2	Flag the records you want to export. ● **Results list.** At a save file results screen, click the open box in front of the brief entry for each record or open the Action/Sort list (top right corner of screen) and click **Flag All on Page** or **Flag All Records Retrieved**. ● **Full record.** On the Action list, click **Flag Record** (action not available for a record retrieved from WorldCat).

	Action
3	**(Optional)** Repeat steps 1 and 2 to retrieve and flag more records for export.
4	At the top of the results screen, open the Action/Sort list and click **Export Flagged Records**. • **Default format specified in Export Options.** The system exports the records immediately. • **No default format specified.** The system displays an Export screen listing all records flagged for export. The Export screen has 3 buttons at the top for selecting the format for exported records. At the top of the Export screen, click **MARC** or **DC HTML** or **DC RDF**. **Results** • For **export to a file**, the system exports the records to a file on the Connexion server. The system creates a new file or, if an export file exists, adds the records to the open file. • For **TCP/IP export**, the system exports the records directly to your local system. • The system changes the record's Export status to **C** (Completed) or **F** (Failed). **Note: Flagged records not in current results list.** If all the records you flagged are not in the current result set, use a Show Flagged option to retrieve a list of all flagged records in the bibliographic save file. • On the Cataloging tab, under Show Options, click **Flagged SF Records**. • On the flagged records screen, open the Action/Sort list and click **Export Flagged Records**.

Download export files

• **Export files:**

—Are created and stored on the Connexion server.

—**Allow appending until downloaded.** You can continue exporting to the same file until you download the file.

—Contain records in **one format**. Separate export files are created for authority records. If you export bibliographic records in more than one format, such as MARC and Dublin Core HTML, the system creates a separate file for each export format used.

—Contain records of a specific format that are exported either by any user from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file type is **Institution**. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to **Individual**.

—Remain available for download for 30 days from the file creation date. After 30 days, the system automatically deletes export files.

• **Exported authority records.** If you export authority records, the Download Export Files screen includes a separate list for authority record export files.

	Action
1	Go to the Download Export Files screen. On the General tab, on the Admin Options list, click **Download Export Files**.
2	1. In the list of files, find the file(s) you want to download. 2. Click to select the check box for the file. **Download multiple files:** You can download 2 or more files at once. However, files downloaded together **must** contain records in the **same format**. Before sending the files to the browser, the system creates **one** file that contains records from **all** selected export files.
3	When finished selecting files, click **Download**.
4	In the File Download dialog box, select **Save** or press <Enter>.
5	1. In the Save As dialog box, use the Save In box to select the location (drive and folder) where you want to save the exported record. 2. In the File Name box, use the supplied name. Or Change the supplied file name and add the appropriate extension: — Supply a name that identifies the file as containing records exported from Connexion. You may want to include a date or day of the week and/or the type of records contained in the export file. — Add an extension to the filename. **Note:** An extension, such as **.dat** or **.exp** or **.mrc**, identifies the file format and/or content. A specific extension may be required if you plan to import record(s) from the file to a local system or other software. — **Note:** To change the default file name for export files, use the **Export File Name** setting on the Export Options screen.
6	1. Click **Save** or press <Enter>. 2. Click **Close** or press <Enter> to close the Download Complete message box.

Tip: Override browser-supplied file type and name for export file

Note: To change the default file name for export files, use the **Export File Name** setting on the Export Options screen.

	Action
1	When the Save As dialog box appears, the browser supplies a default location (drive and folder), file type, and file name. The File Name box is selected. To override the default file type and file name: - In the File Name box, type the name for the export file, including the extension, enclosed in quotation marks. Use the extension your software requires to identify the file as a MARC export file (for example, **.dat**, **.exp**, or **.mrc**). **Example** **"exp1017.dat"** To save the export file to a different location, specify the drive and folder within the quotation marks: - Type the drive letter followed by a colon and a backslash. - Type the folder name(s), separated by backslashes. **Example** **"c:\data\export0310\exp1017.dat"**
2	Click **Save** or press <Enter>.

Manage export files

This section summarizes information and functions provided on the Download Export Files screen.

Column in file list	Purpose or content
Select	Provides check boxes for selecting listed files.
Authorization	Column is blank for **institution** files that contain records exported by any user at your institution. For **individual** files, the column shows the authorization number under which the file was created. May show your authorization number or that of any user from your institution
Created	Date and time when the file was created.
Format	Data format of records in the export file. Possible values are MARC, DC HTML, and DC RDF.
Bytes	Size of file in kilobytes.
Downloaded	Date and time when the file was first downloaded Shows **Not Downloaded** for a file not yet downloaded.
Hidden Appears when you click **Show Hidden Files** to view a list containing files previously hidden.	If the file is currently hidden, lists the date and time the file was hidden. If the file has been restored to the list, the column is blank.

Action	Procedure
Download an export file	Select the check box for the file and click **Download**.
Hide downloaded file	Select the check box for a previously downloaded file and click **Hide**.
Show hidden file	Click **Show Hidden Files**.
Restore hidden file to list	Click **Show Hidden Files**. Select the check box for a hidden file and click **Restore**.
Clear selections	Click **Reset**.

Export statuses

Check Export status

- **Unsaved record.** You must be in edit mode to see Export status for a displayed record retrieved from WorldCat.

- **Record from bibliographic save file.** Export status appears in full records (either edit mode or display mode) and in brief entries on record lists (search results or flagged records).

Export status values

- Before you export a record, if you do **not** take the Mark for Export action, no Export status is set. `Export: _` appears on the Action Status line in the record header and/or in the brief entry on record lists (search results or flagged records).

- If you take the Mark for Export action on a record, the system changes the status to Ready. `Export: R` appears in the full record and/or brief entry.

- When you export a record (single or multiple, via TCP/IP or to a file), the system changes the status to Export Completed. `Export: C` appears in the full record and/or brief entry.

- When an export action fails, the system changes the status to Export Failed. `Export: F` appears in the full record and/or brief entry.

Export status updates

- Whether you export to a file or via TCP/IP, the updated Export status appears immediately in the displayed full record or in brief entries on a displayed list.

MARC export from Connexion

The following table lists specific fields included in all exported bibliographic records.

MARC Field	Exported via Connexion
035	035 subfield $a contains the OCLC control number assigned to the record.

MARC Field	Exported via Connexion
994	994 subfield $a contains the transaction code **C0** (uppercase C and numeral zero) to indicate Connexion export.

Format details: exported records

For a detailed description of exported MARC bibliographic records, see *OCLC-MARC Records*.

Caution: Exporting flagged records

When you export flagged records, the system exports a snapshot of each record as it appeared when flagged. Changes made to the record after you flag it are not reflected in the exported record.

To avoid exporting records that do not reflect all your editing, use the following workflow when editing records for export.

- Edit the record locally. When finished modifying the record, update holdings. Then save the record. If desired, mark the record for export and/or assign a My Status value that identifies it as ready for export.

- When ready to export, retrieve the list of saved records, flag them, and then export them.

- To make further changes to any one of the edited, updated, saved, flagged records, modify the record, unflag the record, and then reflag the edited record.

Note: Flagging works the same way whether or not you lock the WorldCat record before editing. A snapshot is taken when the record is flagged and the snapshot does not change if you continue to edit the record after flagging.

3   Download export files

Download export files
- **Export files:**
  - —Are created and stored on the Connexion server.
  - —**Allow appending until downloaded.** You can continue exporting to the same file until you download the file.
  - —Contain records in **one format**. Separate export files are created for authority records. If you export bibliographic records in more than one format, such as MARC and Dublin Core HTML, the system creates a separate file for each export format used.
  - — Contain records of a specific format that are exported by users from **one institution (OCLC symbol)** or by **one user (authorization number)**. The default file type is **Institution**. To create export files for your individual authorization, set the Export File Type option (on the Export Options screen) to **Individual**.
  - —Remain available for download for 30 days from the file creation date. After 30 days, the system automatically deletes export files.
- **Exported authority records.** If you export authority records, the Download Export Files screen includes a separate list for authority record export files.

	Action
1	Go to the Download Export Files screen. On the General tab, on the Admin Options list, click **Download Export Files**.
2	1. In the list of files, find the file(s) you want to download. 2. Click to select the check box for the file. **Download multiple files:** You can download 2 or more files at once. However, files downloaded together **must** contain records in the **same format**. Before sending the files to the browser, the system creates **one** file that contains records from **all** selected export files.
3	When finished selecting files, click **Download**.
4	In the File Download dialog box, select **Save** or press <Enter>.

	Action
5	1. In the Save As dialog box, use the Save In box to select the location (drive and folder) where you want to save the exported record. 2. In the File Name box, use the supplied name. Or Change the supplied file name and add the appropriate extension: — Supply a name that identifies the file as containing records exported from Connexion. You may want to include a date or day of the week and/or the type of records contained in the export file. — Add an extension to the filename. **Note:** An extension, such as **.dat** or **.exp** or **.mrc**, identifies the file format and/or content. A specific extension may be required if you plan to import record(s) from the file to a local system or other software. — **Note:** To change the default file name for export files, use the **Export File Name** setting on the Export Options screen.
6	• Click **Save** or press <Enter>. • Click **Close** or press <Enter> to close the Download Complete message box.

Tip: Override browser-supplied file type and name for export file

Note: To change the default file name for export files, use the **Export File Name** setting on the Export Options screen.

	Action
1	When the Save As dialog box appears, the browser supplies a default location (drive and folder), file type, and file name. The File Name box is selected. To override the default file type and file name: • In the File Name box, type the name for the export file, including the extension, enclosed in quotation marks. Use the extension your software requires to identify the file as a MARC export file (for example, **.dat**, **.exp**, or **.mrc**). • **Example** **"exp1017.dat"** To save the export file to a different location, specify the drive and folder within the quotation marks: • Type the drive letter followed by a colon and a backslash. • Type the folder name(s), separated by backslashes. • **Example** **"c:\data\export0310\exp1017.dat"**
2	Click **Save** or press <Enter>.

Manage export files

This section summarizes information and functions provided on the Download Export Files screen.

Column in file list	Purpose or content
Select	Provides check boxes for selecting listed files.

Column in file list	Purpose or content
Authorization	Column is blank for **institution** files that contain records exported by any user at your institution. For **individual** files, the column shows the authorization number under which the file was created. May show your authorization number or that of any user from your institution.
Created	Date and time when the file was created.
Format	Data format of records in the export file. Possible values are MARC, DC HTML, and DC RDF.
Bytes	Size of file in kilobytes.
Downloaded	Date and time when the file was first downloaded Shows **Not Downloaded** for a file not yet downloaded.
Hidden Appears when you click **Show Hidden Files** to view a list containing files previously hidden.	If the file is currently hidden, lists the date and time the file was hidden. If the file has been restored to the list, the column is blank.

Action	Procedure
Download an export file	Select the check box for the file and click **Download**.
Hide downloaded file	Select the check box for a previously downloaded file and click **Hide**.
Show hidden file	Click **Show Hidden Files**.
Restore hidden file to list	Click **Show Hidden Files**. Select the check box for a hidden file and click **Restore**.
Clear selections	Click **Reset**.

4   Export flagged bibliographic records

About the flagged record export screen

- You see this screen **only** if you do **not** specify a default export format for bibliographic records (Export Options screen).

- The system displays this screen when you retrieve bibliographic records flagged during the current session and then take the **Export Flagged Records** action.

- **Note:** You can export saved records **only** if the records exist in WorldCat (they have OCLC control numbers). You cannot export a new record.

- The system exports the authority records using your current export method. For export to a file, the system stores the records in an appendable file on the Connexion server. For TCP/IP export, the system sends the records directly to your local system.

Use this screen

	Action
1	At the top of the Export screen, click **MARC** or **DC HTML** or **DC RDF**. **Results** • For **export to a file**, the system exports the records to a file on the Connexion server. The system creates a new file or, if an export file exists, adds the records to the open file. • For **TCP/IP export**, the system exports the records directly to your local system.
2	If you export to a file, when ready to download exported records: Go to the Download Export Files screen. On the General tab, on the Admin Options list, click **Download Export Files**.
3	1. In the list of files, find the file(s) you want to download. 2. Click to select the check box for the file. **Download multiple files:** You can download 2 or more files at once. However, files downloaded together **must** contain records in the **same format**. Before sending the files to the browser, the system creates **one** file that contains records from **all** selected export files.

	Action
4	In the File Download dialog box, select **Save** or press <Enter>.
5	1. In the Save As dialog box, use the Save In box to select the location (drive and folder) where you want to save the exported record. 2. In the File Name box, use the supplied name. Or Change the supplied file name and add the appropriate extension: — Supply a name that identifies the file as containing records exported from Connexion. You may want to include a date or day of the week and/or the type of records contained in the export file. — Add an extension to the filename. **Note:** An extension, such as **.dat** or **.exp** or **.mrc**, identifies the file format and/or content. A specific extension may be required if you plan to import record(s) from the file to a local system or other software. — **Note:** To change the default file name for export files, use the **Export File Name** setting on the Export Options screen.

Export formats for bibliographic records

Format	Description
MARC	Complies with MARC21 standard. Formatted as for records exported from OCLC WorldCat.
Dublin Core HTML	Dublin Core metadata formatted as HTML. The content of each DC element appears enclosed in <meta> flags; a name attribute identifies the specific DC element.
Dublin Core RDF	Dublin Core metadata formatted as XML using the Resource Description Framework. The content of each DC element is enclosed in <dc:[element]> flags.

Caution: Exporting flagged records

When you export flagged records, the system exports a snapshot of each record as it appeared when flagged. Changes made to the record after you flag it are not reflected in the exported record.

To avoid exporting records that do not reflect all your editing, use the following workflows when editing records for export.

- **Records retrieved from WorldCat**
  —Edit the record locally. When finished modifying the record, update holdings. Then save the record. If desired, mark the record for export and/or assign a My Status value that identifies it as ready for export.
  —At the end of your session, retrieve the list of saved records, flag them, and then export them.
  —To make further changes to any one of the edited, updated, saved, flagged records, modify the record, unflag the record, and then reflag the edited record.

Note: Flagging works the same way whether or not you lock the WorldCat record before editing. A snapshot is taken when the record is flagged and the snapshotdoes not change if you continue to edit the record after flagging.

5 Import bibliographic or authority records

Why import records?

- Contribute bibliographic or authority records created in your library's local system.

- Process bibliographic records from OCLC offline services: PromptCat, Bibliographic Record Notification, GovDoc, and WorldCat Collection Sets.

- Process unresolved Batchload records.

Records you can import

- Bibliographic or authority records:

  —MARC format only (OCLC-MARC or MARC21).

  —Exported from a local system. Export the records to a file via your system's MARC export function.

- Bibliographic records received from OCLC offline services: PromptCat, Bibliographic Record Notification, GovDoc, WorldCat Collection Sets, and Batchload.

- OCLC bibliographic records (records that contain an OCLC control number in the 001 field) from offline products or from your local system.

- **Note: Use imported OCLC bibliographic records.**

  —You can take most actions on imported OCLC bibliographic records, including: Derive New Record, Export, Update Holdings, and Validate.

  —**Cannot delete holdings.** Imported OCLC records do not contain the indication that the item is Held or Not Held by your library. You cannot take the Delete Holdings action on imported record. To view holdings for the item, take the Display Holdings action.

  —**Caution: Lock and Replace.** If you use an imported OCLC bibliographic record to lock the corresponding WorldCat record, Connexion locks and displays the current version of the WorldCat record, overwriting any changes you made to the imported record. The system warns you that your changes will be lost and asks whether you want to continue.

- OCLC authority records (records that contain an OCLC Authority Record Number (ARN)) exported from your local system or supplied via the OCLC MARS service.

  —**Record actions: Derive only.** To use an imported OCLC authority record, you must first take the Derive New Record action. You cannot take other actions on the imported record. After completing the derived record, you can take any action, including: Export Record, Submit Record for Review, and Add Record.

  —**Cannot validate.** Imported OCLC authority records do not pass validation in Connexion browser. Internal dates in imported authority records do not match the system date. You cannot correct this problem by modifying the record. To use the content of the imported record within Connexion, derive a new record from it; the derived record does not contain the mismatched internal date.

—**Caution: Lock and Replace.** If you use an imported OCLC authority record to lock the corresponding WorldCat record, Connexion locks and displays the current version of the WorldCat record, overwriting any changes you made to the imported record. The system warns you that your changes will be lost and asks whether you want to continue.

- Non-OCLC bibliographic records.

    —Imported as new records (workforms)

    —On these records, you can take any actions that are available for bibliographic workforms generated within Connexion.

- Non-OCLC authority records

    —Imported as new records (workforms)

    —On these records, you can take any actions that are available for authority workforms generated within Connexion

About import files

Property	Requirements and notes
Format	OCLC-MARC or MARC21 only. **Caution:** - **Non-MARC files.** If you try to import from a non-MARC file (for example, a file with the extension .doc, .xls, .mdb, .msg, .gif, .jpeg, or .tif), Connexion displays an error message. - **File with corrupt or fragmented MARC records** If you try to import from a corrupted file of MARC records, or a file that contains some MARC data, the system cannot process the file. If the browser is inactive for more than 5 minutes, click the **Stop** button. Then check the file for problems before retrying import.
Record types	Bibliographic records Authority records
Size	No prescribed maximum for file size (KB or MB). Connexion imports records in groups of 100, pausing after each group to ask you to confirm that you want to continue. Maximum number of records you can import depends on the number of records currently in your bibliographic or authority save file. Save files can contain up to 9,999 records.
Location	Disk: Hard disk or network drive connected to local workstation. URL: Public Web server. Connexion must be able to retrieve the file via an HTTP request. **Note: No FTP support.** Due to security measures, the import function cannot retrieve files via FTP; only the HTTP protocol is supported.

Prepare to import records

	Action
1	Select and/or set up the location (local drive or URL) for files of records to import.
2	Create or retrieve file of records to import. • Export bibliographic or authority records from OCLC software or from your local system Or • Retrieve a file of bibliographic records received from your OCLC cataloging service (PromptCat, Bibliographic Record Notification, GovDoc, WorldCat Collection Sets, or Batchload)
3	Move the file of records to the local drive or upload to the Web server.

4	(Optional) Decide whether to apply constant data or insert My Status notes in the imported records:
	• Bibliographic records
	  — **Apply default constant data.** Verify that your current default constant data record is appropriate. Edit the default CD record or designate another CD record as your default CD. Change the Fields to Apply setting if desired.
	  — **Include My Status note.** When importing records from an OCLC service, select the My Status option and specify the appropriate record type. For other records, leave the record type box empty. For any group of imported records, assign a distinctive My Status note to help you manage the records in the bibliographic save file.
	• Authority records
	  — **Apply default constant data.** Verify that your current default authority constant data record is appropriate. Edit the default CD record or designate another CD record as your default authority CD. Change the Fields to Apply setting if desired.

Import bibliographic or authority records

	Action
1	Log on to Connexion browser.
2	On the Cataloging tab or the Authorities tab, under Create Options, click **Import Records**.
3	Specify the records to import. Under **Type of Records to Import**: • Select **Import Bibliographic Records** to import bibliographic records only. Or • Select **Import Authority Records** to import authority records only. Or • Select **both** check boxes if the file contains both bibliographic and authority records and you want to import both record types at once.

	Action
4	Specify the file location. Under **File Location**: ● In the **Disk** text box, type the full path (drive letter, folder, and file name) for an import file on a local hard disk or network drive. Or click the **Browse** button to navigate to the location. Or ● In the **URL** text box, type the URL for an import file located on a Web server. **Note:** You must specify the URL using the HTTP protocol, beginning with **http://** **Note:** ● Below each text box, the screen shows the location from which you last imported records. ● Specify **either** a disk location or a URL. If you click **Import** with text in both boxes, an error message appears.
5	(Optional) Apply default constant data Under Import Bibliographic Records or Import Authority Records: ● Select the **Apply Default Constant Data** check box to apply your default constant data record to imported bibliographic records and/or authority records. Or ● Clear the check box to import records without applying constant data.
6	(Optional) Assign My Status to bibliographic records Under My Status for Bibliographic Records: ● **Type.** For records from OCLC offline services, select the service that supplied the records you plan to import. For other records, leave the Type box empty. ● **Identifier box.** For any bibliographic record, type a distinctive note to help you retrieve and manage imported records in the bibliographic save file.
7	Click **Import**. **Results** ● Connexion imports the specified records, beginning with the first record in the file. ● The system adds the records to the bibliographic save file and/or the authority save file with the source status **Imported**. ● Non-OCLC records are imported as OCLC workforms. ● Based on the options you select, the system applies default constant data and/or inserts My Status notes (bibliographic records only). ● After importing all specified records, Connexion displays a results screen that gives totals for bibliographic and/or authority records and reports actions taken on the records. **More than 100 records in file** If the import file contains more than 100 records: 1. Connexion imports the first 100 records. 2. The system displays a status screen and asks you to confirm that you want to continue importing records. Click **OK** or press <Enter> to continue importing with the next record in the file. 3. After importing each group of 100 records, the system again pauses and asks you to click **OK** or press <Enter> to continue.

Imported records: details

- All imported records are assigned the source status **Imported**.

- MARC21 records are converted to OCLC-MARC.

- Non-OCLC records are converted to workforms.

- The following table gives details on changes Connexion makes automatically during the import process.

Record type	OCLC record	Non-OCLC record
Bibliographic	- Workflow status: In process - Locked WorldCat file expirationdate: 14 days. - OCLC control number retained in 001. - If Lang in fixed field is 3 blanks, change to zxx (No linguistic content). - If record contains 533 $7, convert the data to a 539 field. - Delete f field 994 if present.	- Workflow status: New - Locked WorldCat file expirationdate: 14 days. - NEW in 001. - Entered date replaced with current date. - RecStat value set to n. - Default 040 field inserted. - If Lang in fixed field is 3 blanks, change to zxx (No linguistic content). - If record contains 533 $7, convert the data to a 539 field.
Authority	- Workflow status: In process - Save file expiration date: 90 days. - ARN retained in 001.	- Workflow status: New - Save file expiration date: 90 days. - NEW in 001. - Entered data replaced with current data. - RecStat value set to n. - EncLvl value set to n. - Default 040 field inserted. - Fields deleted: 002, 003, 004, 005, 009, 010, and 035.

Find imported bibliographic records

Action
Show by Status screen On the Cataloging tab, under Show Options, click **By Status**.   1. At the status list screen, under Show Save File, Source Status, select the check box for the **Imported** status.   2. Then click **Show Records** or press <Enter>.   Or   **Search Save File screen** On the Cataloging tab, under Search Options, click **Save File**.   ● **Search for Imported status.** On the Search Save File screen, at the bottom of the search form, open the **Source Status** list and click **Imported**.   ● **Search for My Status text.** In the Search for box, type the text you supplied on the Import Records screen. You can search for any whole word in the note. Search for the Type only (if specif ied), for any word in the f ree-text Identif ier, or for the complete My Status note (Type plus user-def ined note).   **Example** If you selected PromptCat f rom the Type list and also supplied the date **20031031** in the Identif ier box, you can retrieve the records by searching for **PromptCat** only, for **20031031** only or for the complete note **PromptCat 20031031**.   ● Then click **Search** or press <Enter>.

Find imported authority records

Action
Show by Status screen On the Authorities tab, under Show Options, click **By Status**.   1. At the status list screen, under Show Save File, select the check box for the **Imported** status.   2. Then click **Show Records** or press <Enter>.   Or   **Search Authorities Save File screen** On the Authorities tab, under Search Options, click **Save File**.   ● On the Search Save File screen, at the bottom of the search form, open the **with Status** list and click **Imported**.   ● Then click **Search** or press <Enter>.