How to Import a Bibliographic Record from OCLC

Note:  For use only after consultation with and approval by your supervisor.

OCLC cataloging software setup for export to Aleph must be in place before you can import records.

Harvard staff import bibliographic records from OCLC directly into the Aleph server. This is a real-time import. Records will be available to staff for editing in Aleph and to the public for viewing as soon as they have been indexed. Please read these guidelines carefully and refer your questions to your supervisor.

Staff who import records from OCLC are responsible for monitoring HULINFO listserv message alerts regarding OCLC problems. These messages will be identified by the Subject line: OCLC EXPORT PROBLEM ALERT or OCLC EXPORT PROBLEM SOLVED.

A. Please note:
Do not update or produce ("claim") records if you are using F5 to import a record from OCLC to Aleph. Holdings should be set via a “send record to utility” flag, at point of cataloging, in the Aleph Holdings record. See the document, "XPR – Send Record to Utility Flag," for details.

B. Things to watch for:
1. Import from OCLC works only if Aleph is up and running.

2. If you are targeting an existing Aleph bibliographic record, please consult the document, “Targeting an Aleph Bibliographic Record from OCLC”

3. Note that Institution Records for institutions other than your own, including libraries at Harvard with a different holdings symbol, cannot be edited in Connexion. Institution records can only be exported without modification. Since Institution Records cannot be edited, they cannot be used to target an existing Aleph record.

4. The newly imported bibliographic record does not automatically appear on your screen. You must search for it in HVD01. Please search by author or title, because this will reveal duplicate bibliographic records that have been caused by incorrect targets.

5. There is a brief time lapse between the receipt of the newly imported record and complete indexing of the record in Aleph. If you search for your record in Aleph and it is not immediately available, please be patient.

6. The newly imported bibliographic record displays to the public as soon as it is imported and indexed, without any indication of location or status. Remember to finish the processing steps associated with the record in order to establish location and status information for users.
7. If your bibliographic record does not show up in Aleph:
   - Do NOT export a second time from OCLC.
   - Make a printout of the OCLC record and report the problem to your supervisor.
   - Call the Office for Information Systems (5-3724) and report the problem.

8. Guidelines for reporting such problems are available at the OIS Aleph documentation site. See “How to Report OCLC Export Failure to OIS.”

9. If you accidentally export a record twice, please delete one of the records (add STA field to the bibliographic record as follows: STA 1_ a DELETED). See your supervisor for assistance.

10. If the duplicate isn’t detected immediately and Items or Order records need to be moved, please follow the procedure described in the document Bibliographic records: resolving duplicates in Aleph.

11. Import the OCLC record with the default 049 field provided. This information is useful for problem-solving in Aleph and can remain in the bibliographic record until the record is edited for the first time.

12. If the language of cataloging is not English as indicated by a value in 040 $$b$$ other than ”eng”, the 035 and 040 tags are automatically deleted when the record is exported to Aleph. In addition the encoding level is changed to 5. This is done so that Harvard holdings symbols are not set on the foreign language master record in WorldCat.

C. Procedure for importing a record:

1. With the OCLC record on the screen, press the OCLC export record function key: <F5>

2. Watch for the following box to pop up on the screen. When it first appears, it will contain the status message, “Waiting for local system response…” This is a message indicating that OCLC has initiated the export and is waiting for Aleph to confirm receipt.
3. Watch for the message in the dialogue box to change.

When the export to Aleph is successful, the status message changes to “Export processing completed.” This is a message from OCLC.

When the import into Aleph is successful, the host message appears, “Note: Record received.” This is a message from Aleph.

Close this box, and then close the window before initiating another search (to avoid a second inadvertent export of the same record). If you have added an 035 field for targeting, remove the field before closing the window.

These two messages may occur in rapid succession, so it is possible that you will see only the second set of messages. Please note, however, that if you are not paying attention and you hit the Cancel button when the status message reads “Waiting for local system response,” your record will not be exported to Aleph.

4. If you do not receive messages confirming successful export:
   - Do NOT export the record a second time from OCLC.
   - Copy any message that appears on the screen.
   - Make a printout of the OCLC record and report the problem immediately to a supervisor.
   - Call the Office for Information Systems (5-3724) and report the problem.

Guidelines for reporting such problems are available at the OIS Aleph documentation site. See “How to Report OCLC Export Failure to OIS.”
D. OCLC Export errors

OCLC export errors occur occasionally, for a variety of reasons associated with telecommunications problems between OCLC and the Aleph server. Technical services staff are responsible for reporting these errors immediately to OIS.

Please do not report OCLC coding messages to OIS; these are caused by incorrect coding on the utility itself. Such messages are displayed in a separate window in the Connexion client.

Messages about the success or failure of the OCLC export function are delivered in the OCLC Gateway Export Status pop-up box. In some instances, you may also receive another pop-up box with a message that begins with, “Unable to open the TCP/IP connection.” These are the messages that must be reported to OIS immediately.

For more information, please review the following documentation:

Targeting an Aleph Bibliographic Record from OCLC

How to Report OCLC Export Failure to OIS

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