Importing MARC Files from CatExpress into Symphony

Symphony Cataloging

Download file from CatExpress

OCLC Connexion - Mozilla Firefox

File Edit View History Bookmarks Tools Help

OCLC Connexion | Social Media & News | Utah Departm...

connexion.oclc.org/WebZ/html/corc/corcframe.html?sessionid=cnxs04.prod.oclc.org-58023-hqfq582i-lknbf9:entitydbname=WorldCat

Most Visited | Getting Started | Imported From IE | BookBuzz | ILL | ESS -Time | DL | Utah-ID Login | OCLC WorldShare | USL | OCLC Connexion - Log... | RDA Toolkit | Adobe Connect

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Express | General | OCLC

Search | Other

* Basic | Other Options

Other Options
Download Export Files
Documentation

Basic Search

WorldCat

Search for _____ in
- Standard Number
- Keywords
- Title Phrase

Apply Language Of Cataloging Limiter All

Search | Clear Search

Quick Tip
- Numeric searches are the most precise.
- Omit hyphens from ISBNs, but include them for ISSNs.
- Precede LCCN searches with **In:**, for example, **In:2003-4575**.

Select file and click Download

OCLC Connexion - Mozilla Firefox

File Edit View History Bookmarks Tools Help

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connexion.oclc.org/WebZ/html/corc/corcframe.html?sessionid=cnxs04.prod.oclc.org-58023-hqfq582i-lknbf9

Most Visited | Getting Started | Imported From IE | BookBuzz | ILL | ESS -Time | DL | Utah-ID Login | OCLC WorldShare | USL | OCLC Connexion - Log... | RDA Toolkit | Adobe Connect

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Express | General | OCLC

Search | Other

Search Options | * Download Export Files

Download Export Files

Download export files for: UTCCB — Show Hidden Files

Bibliographic Records

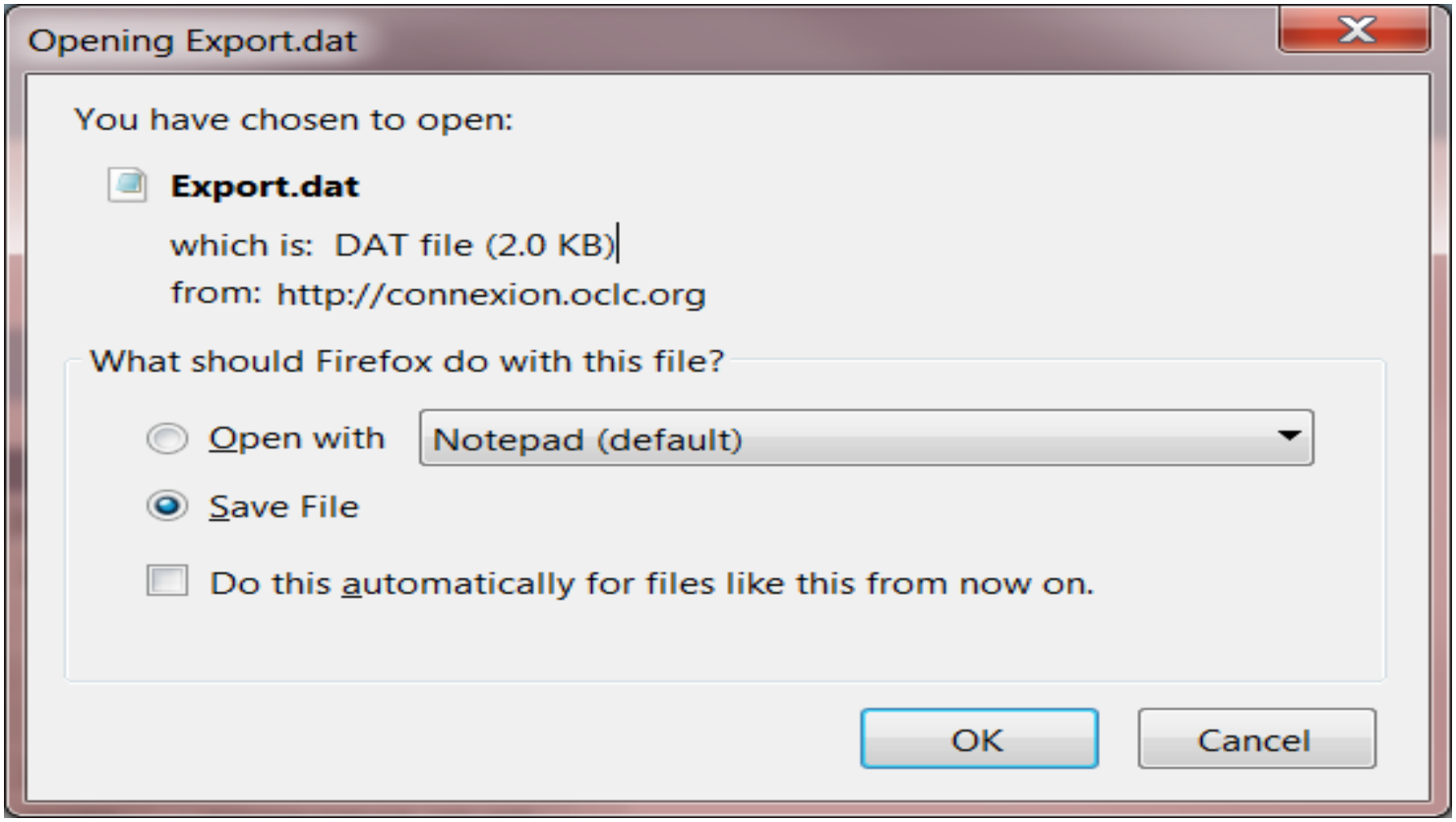
Select	Authorization	Created	Format	Bytes	Downloaded
☑		01/08/2014,10:57	MARC	2083	01/14/2014,11:33
☐		12/30/2013,14:40	MARC	527	12/30/2013,14:43
☐		12/30/2013,12:06	MARC	527	12/30/2013,12:06
☐		12/30/2013,11:55	MARC	527	12/30/2013,11:55
☐		12/23/2013,11:08	MARC	2527	12/23/2013,11:08
☐		12/23/2013,10:46	MARC	3473	12/23/2013,10:47

Download | Reset | Hide

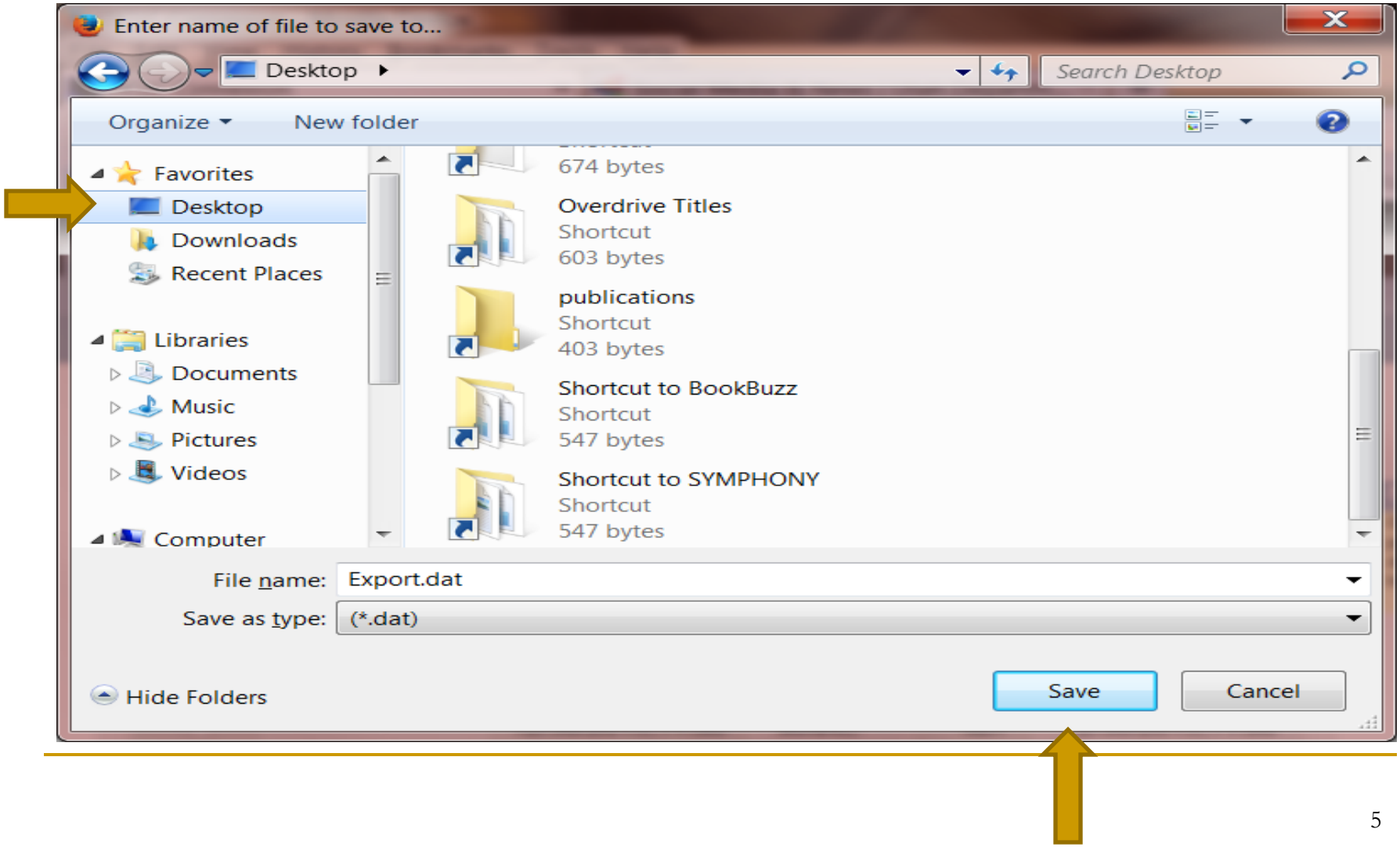
Quick Tip

Only files that have previously been downloaded may be hidden.

Save file – Use FireFox Browser (set default to ask where to save downloads)



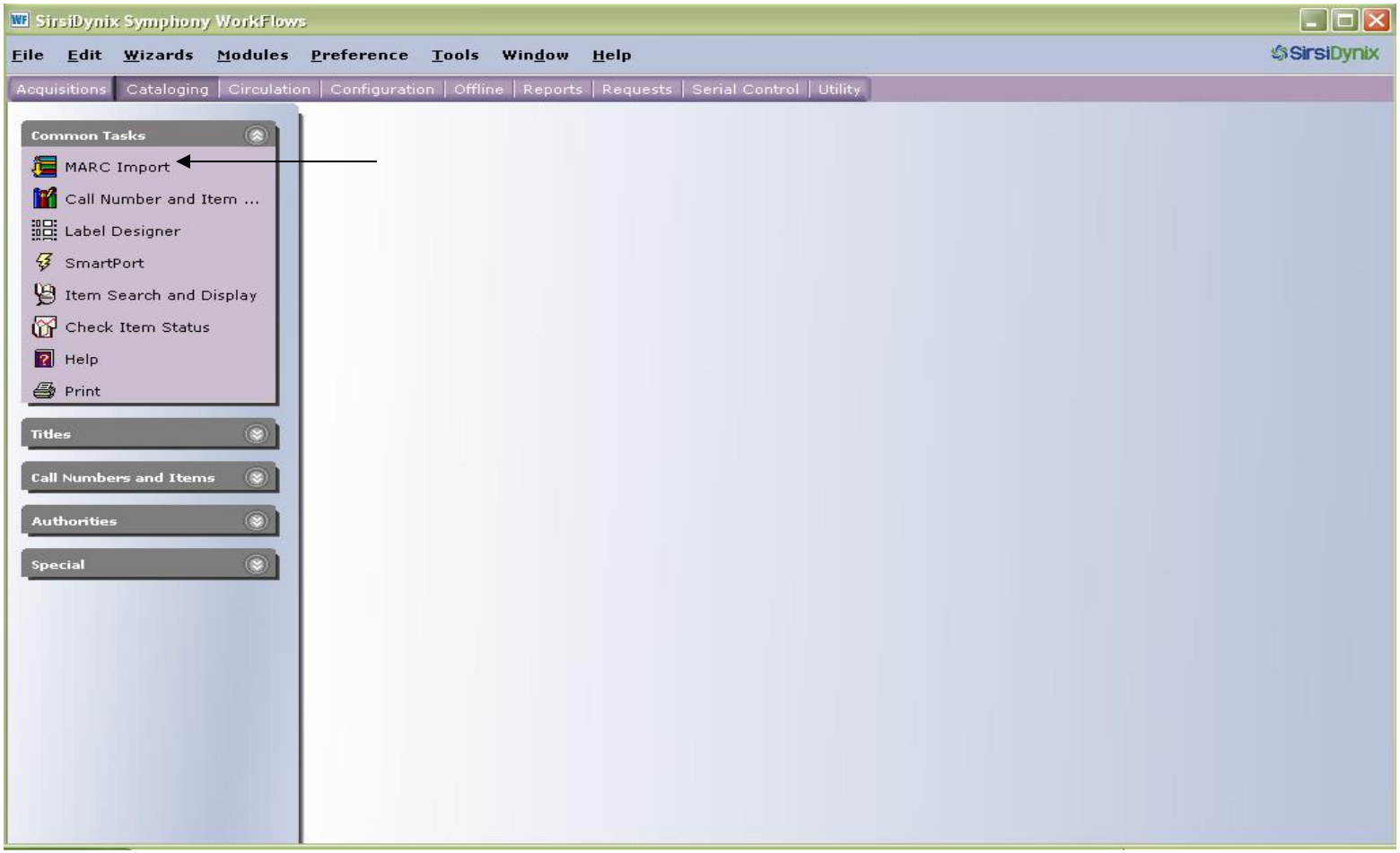
Save file to Desktop – Keep file name as "Export.dat"



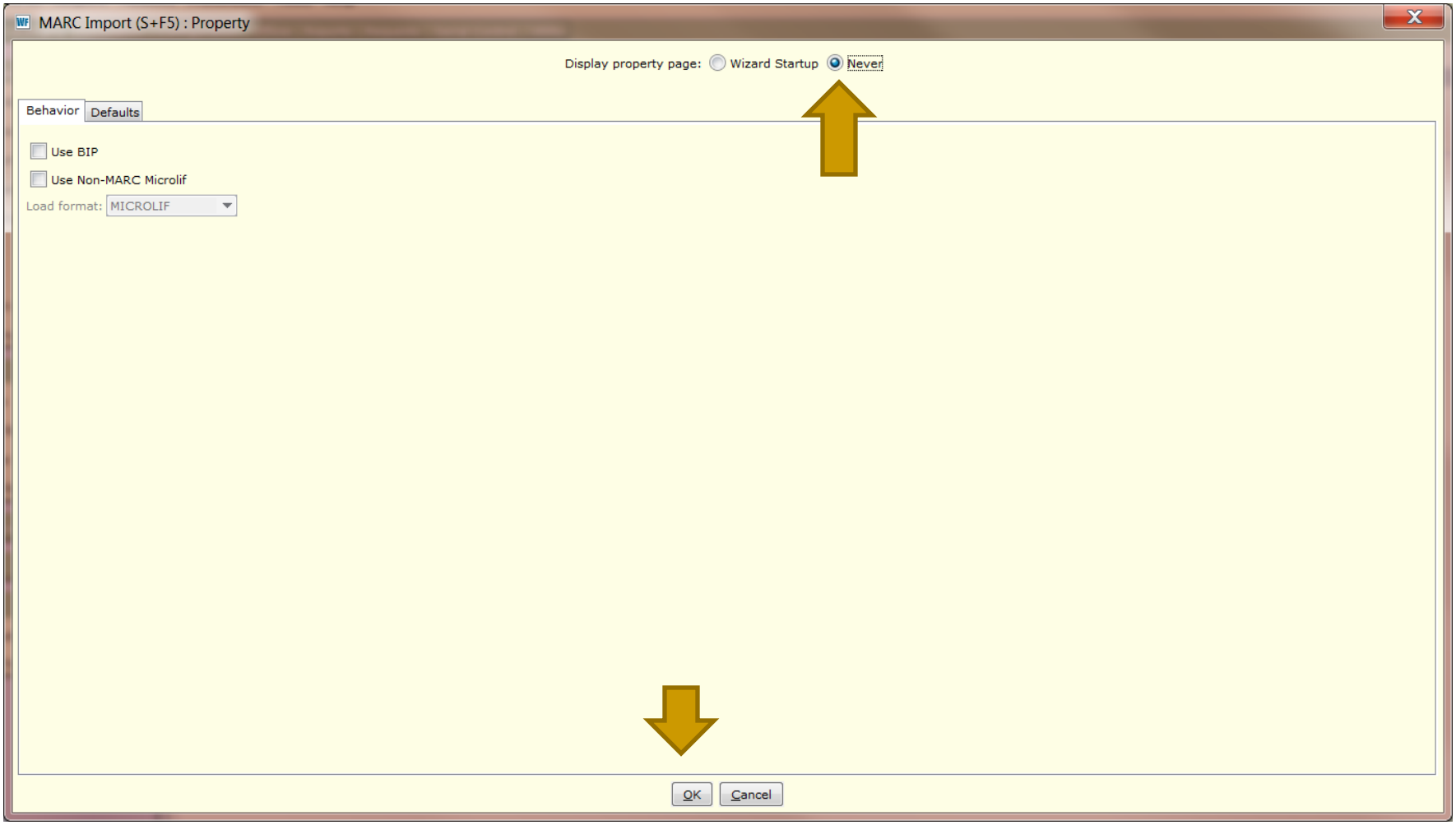
Exit CatExpress and Open Symphony

Step 1: Import file

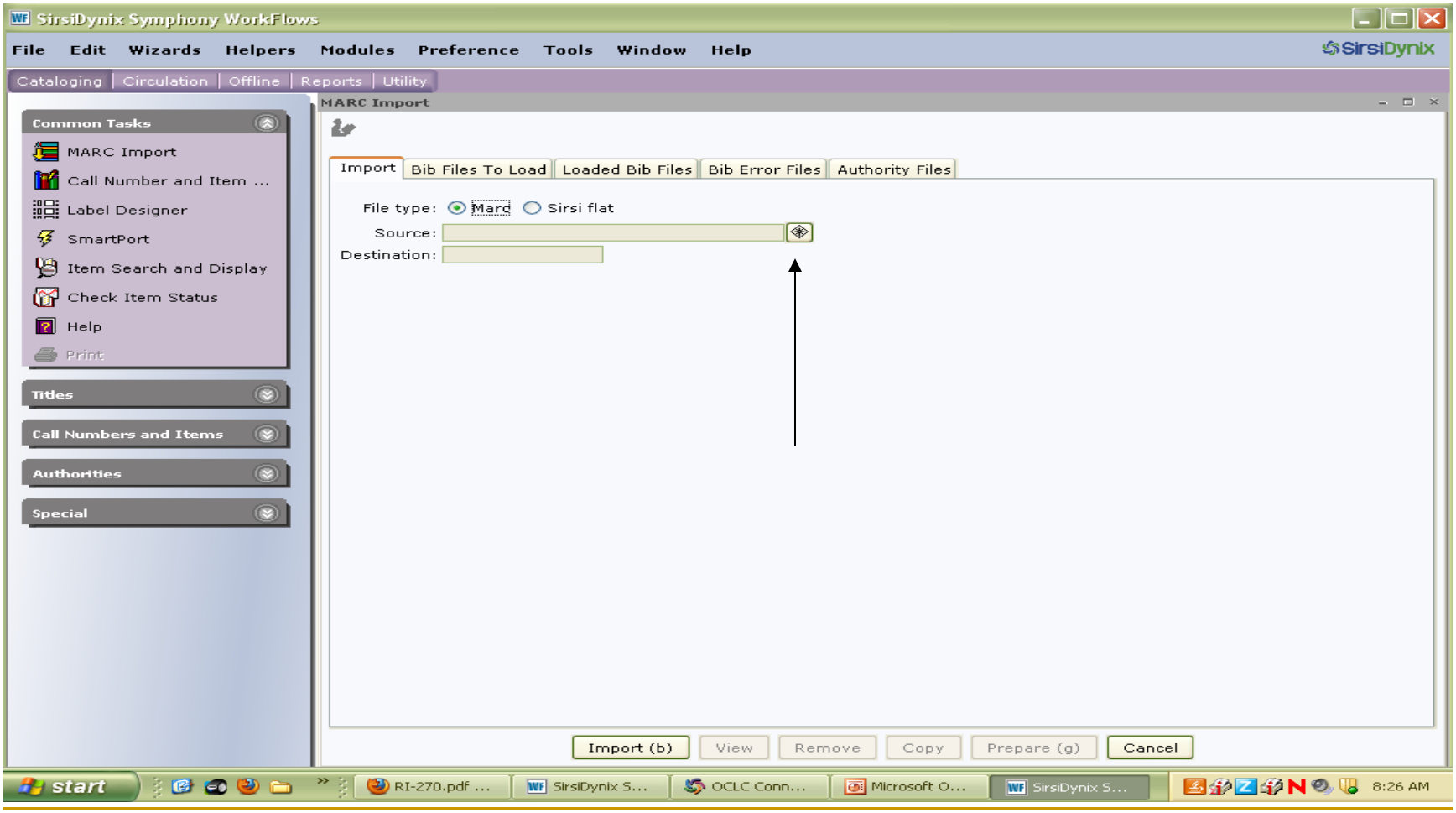
- Cataloging module>Common Tasks>Marc Import



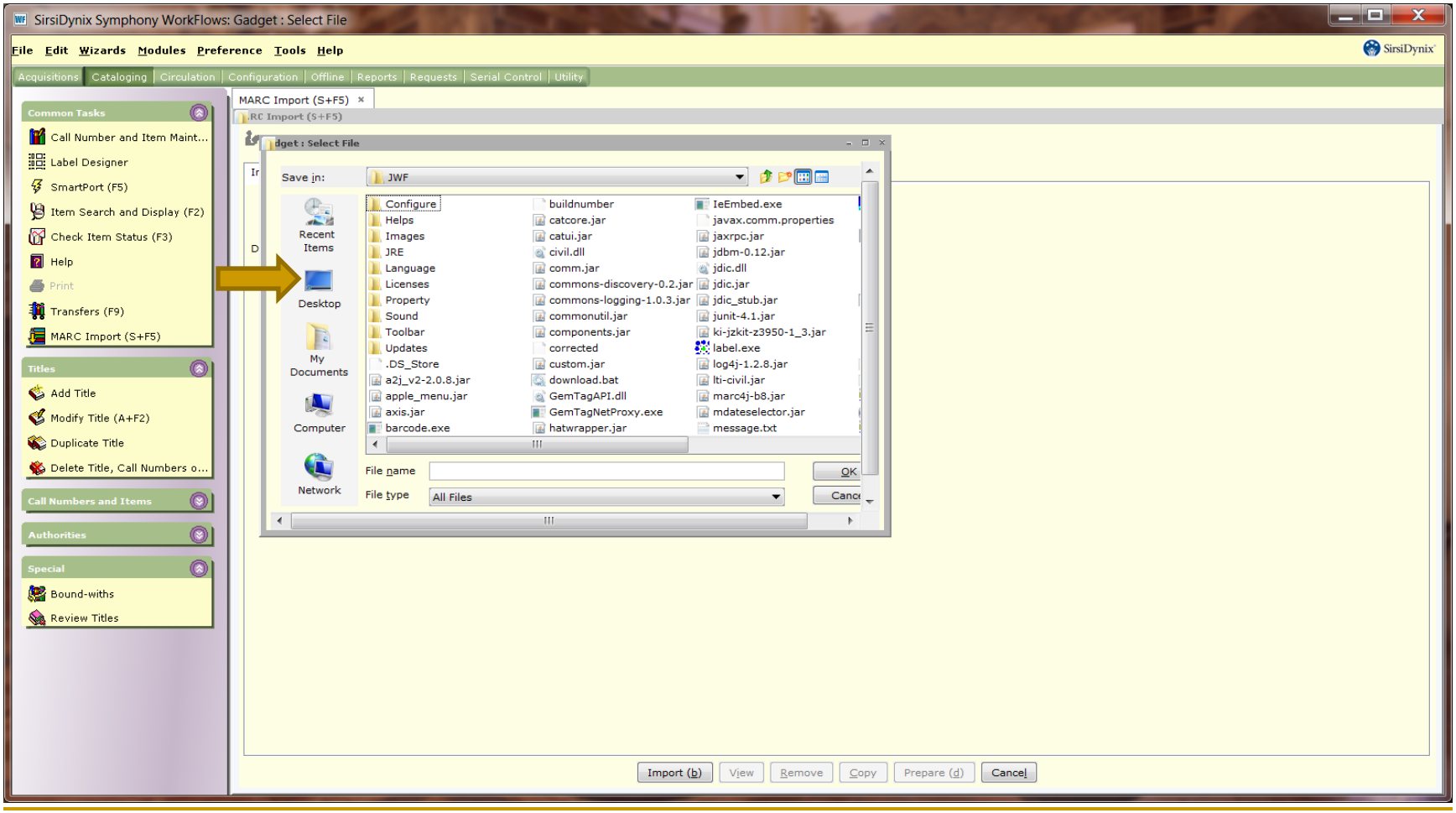
If you see the default page choose Never and OK



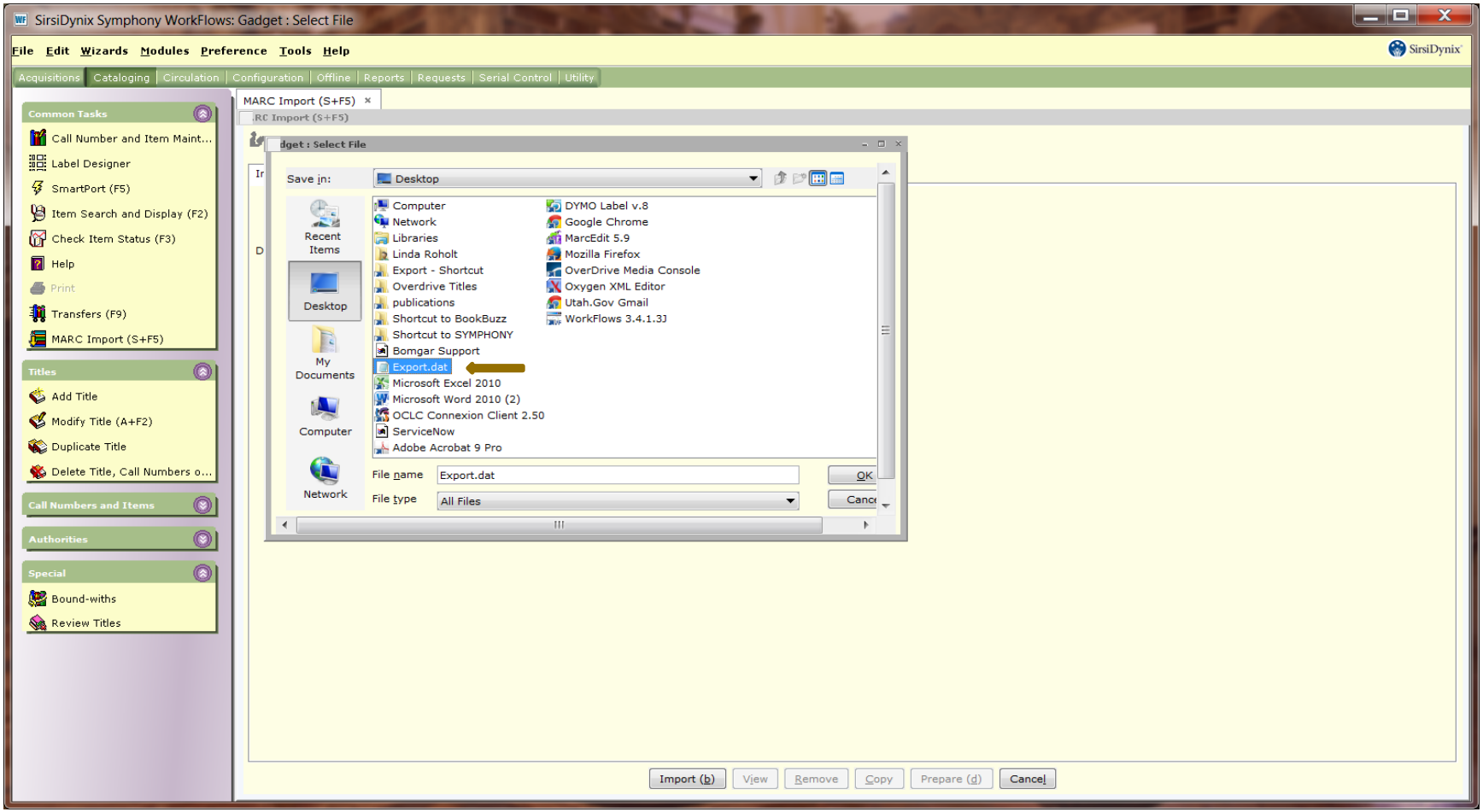
Find the file to import – use gadget at the end of the source area



Go to Desktop Icon



Double Click or Highlight and click OK on Export File



File is now in the Source area

SirsiDynix Symphony WorkFlows: MARC Import (S+F5)

File Edit Wizards Helpers Modules Preference Tools Help

Acquisitions | Cataloging | Circulation | Configuration | Offline | Reports | Requests | Serial Control | Utility

Common Tasks
- Call Number and Item Maint...
- Label Designer
- SmartPort (F5)
- Item Search and Display (F2)
- Check Item Status (F3)
- Help
- Print
- Transfers (F9)
- MARC Import (S+F5)

Titles
- Add Title
- Modify Title (A+F2)
- Duplicate Title
- Delete Title, Call Numbers o...

Call Numbers and Items

Authorities

Special
- Bound-withs
- Review Titles

MARC Import (S+F5)

Import | Bib Files To Load | Loaded Bib Files | Bib Error Files | Authority Files

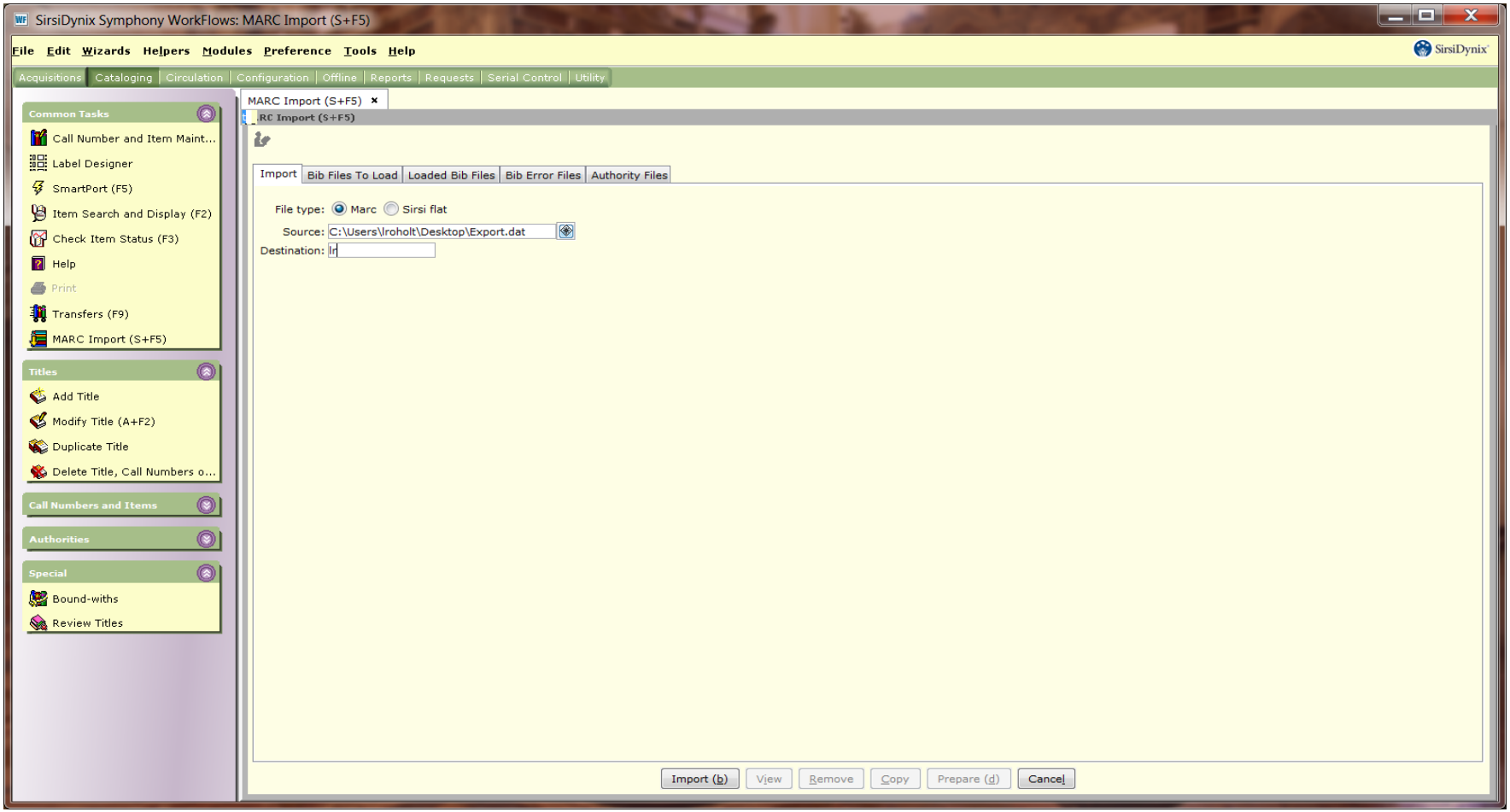
File type: Marc Sirsi flat

Source: C:\Users\lroholt\Desktop\Export.dat

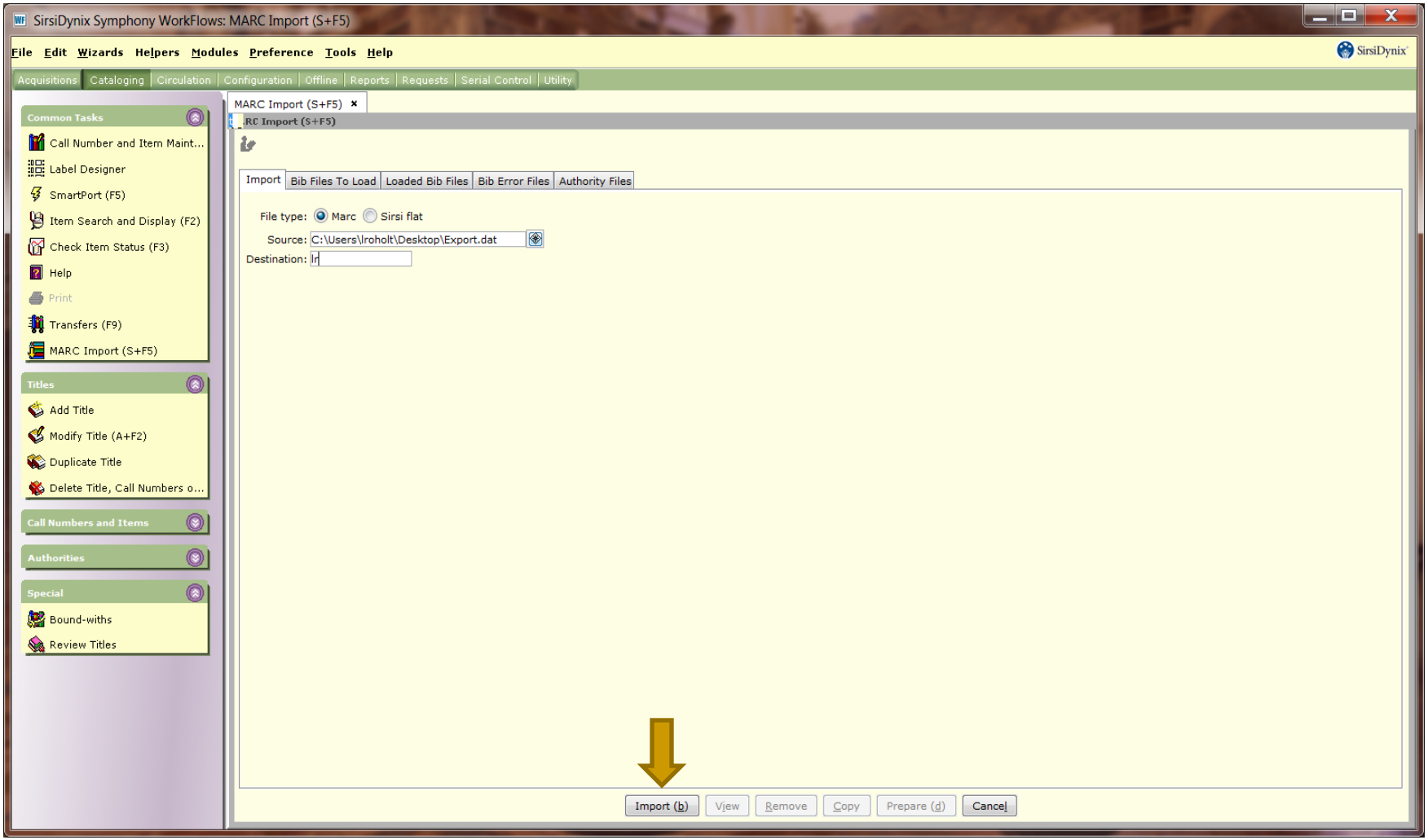
Destination:

Import (b) View Remove Copy Prepare (d) Cancel

Add destination name – use initials or other unique description



Click Import (this will put the file on the server)



No other files to load – click No

SirsiDynix Symphony WorkFlows

File Edit Wizards Helpers Modules Preference Tools Window Help

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks
- MARC Import
- Call Number and Item ...
- Label Designer
- SmartPort
- Item Search and Display
- Check Item Status
- Help
- Print

Titles

Call Numbers and Items

Authorities

Special

MARC Import

Import | Bib Files To Load | Loaded Bib Files | Bib Error Files | Authority Files

File type: Marc Sirsi flat

Source: C:\OCLC\Export.dat

Destination: lr

MARC Import : Confirmation

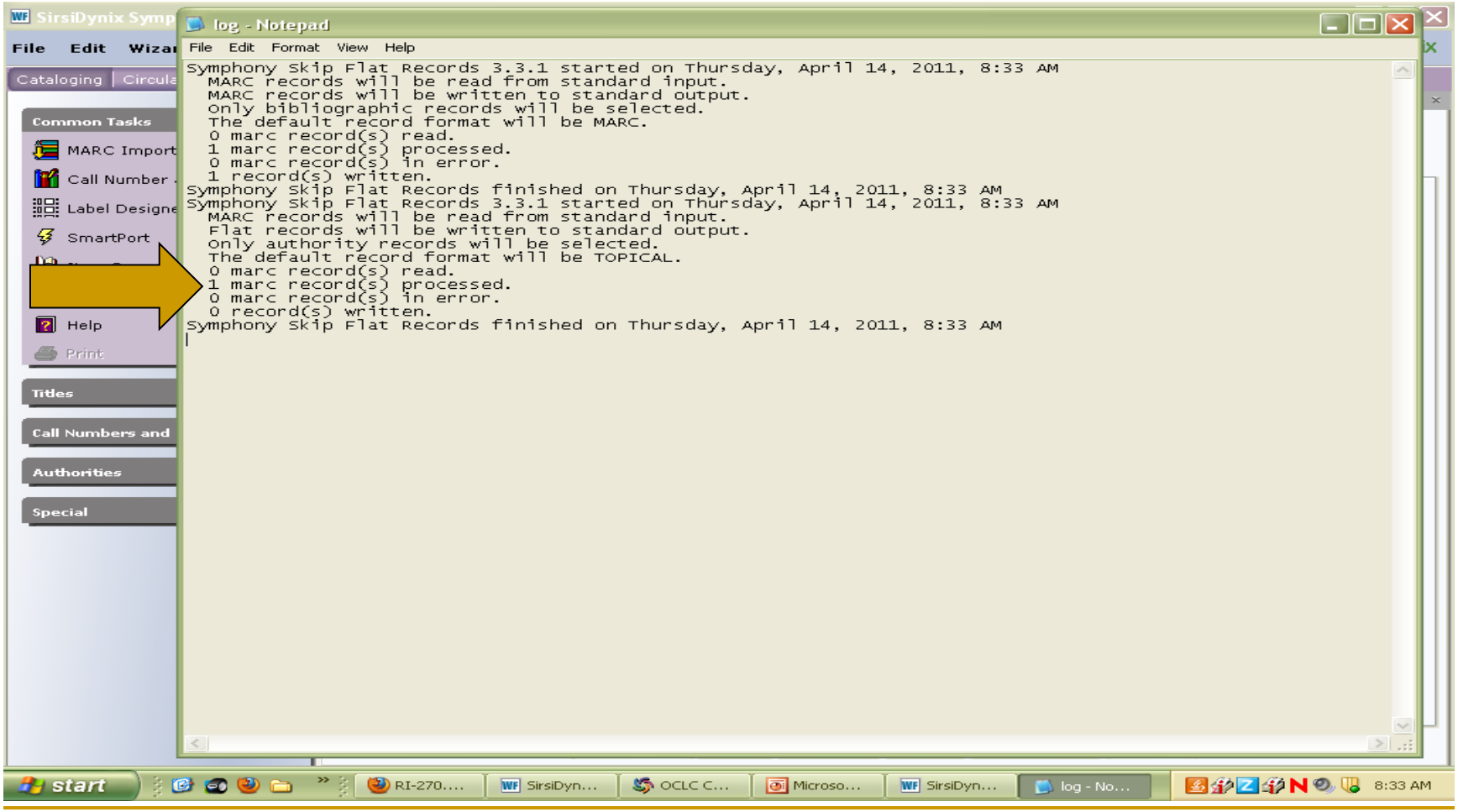
Are there more files to upload?

Yes No

Import (b) View Remove Copy Prepare (g) Cancel

start RI-270.pdf ... SirsiDynix S... OCLC Conn... Microsoft O... SirsiDynix S... 8:33 AM

Verification of import – check quantity processed. If it is 0 re-import.

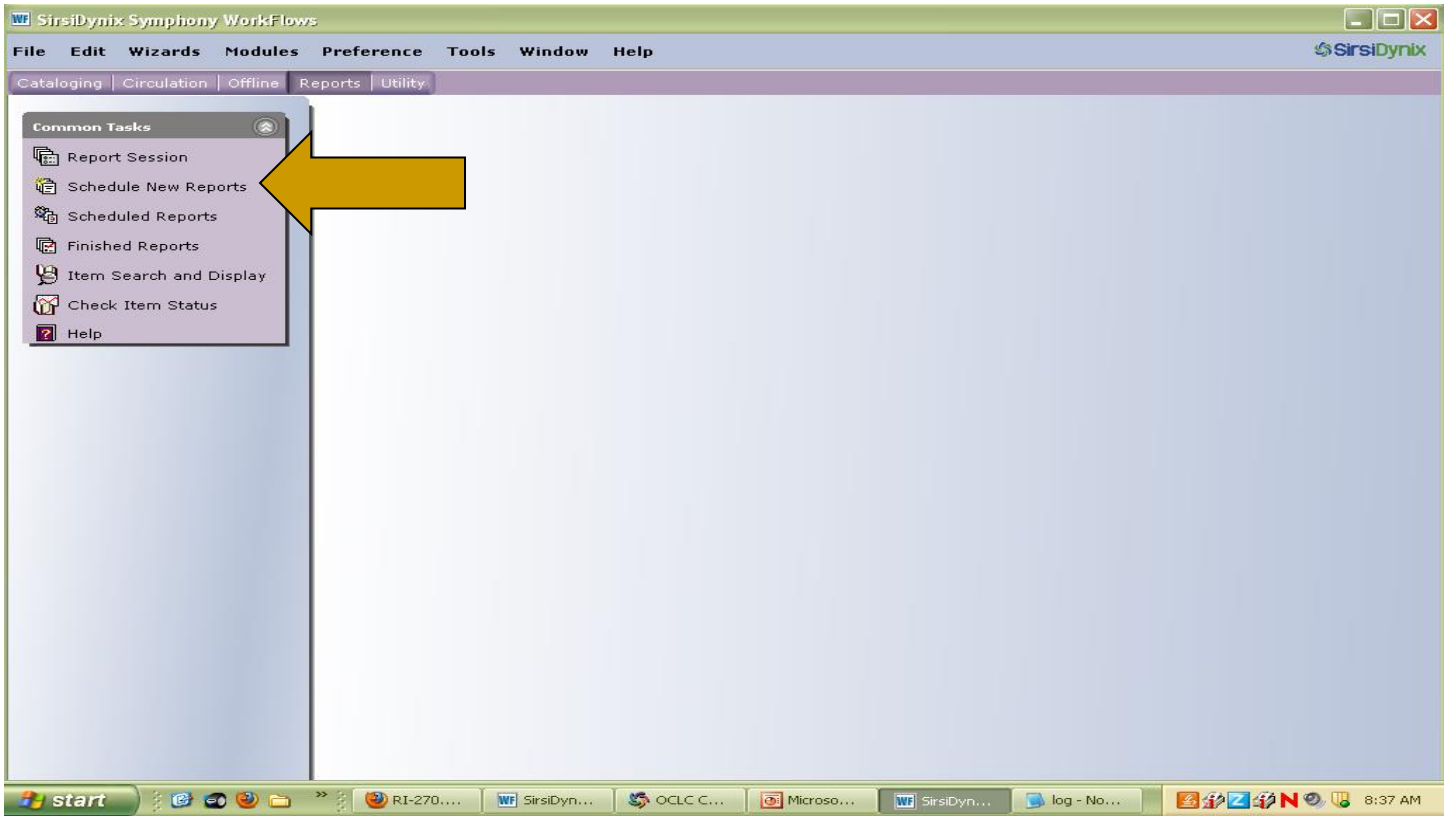


Finished with step 1

- You can now close the import verification window and the import wizard in Symphony.

Step 2: Schedule a report (this will move the file from the server to your library)

- Reports>Schedule a New Reports



If you see the Set Session Settings page – uncheck "Review Settings each session" then OK

SirsiDynix Symphony WorkFlows: Set Session Settings

File Edit Wizards Modules Preference Tools Help

Acquisitions | Cataloging | Circulation | Configuration | Offline | Reports | Requests | Serial Control | Utility

Common Tasks
- Report Session (F11)
- Schedule New Reports (F4)
- Scheduled Reports (F7)
- Finished Reports (F5)
- Item Search and Display (F2)
- Check Item Status (F3)
- Help

Set Session Settings

Session Settings

Review Settings Each Session

Defaults

Application to view reports: C:\Windows\notepad.exe

Application to print reports: C:\Windows\notepad.exe/p

Application to view XML reports:

Setup & Schedule
- [x] Display report source column
- [ ] Notify owner when report is finished
- [ ] Send notices automatically
- [ ] Preserve template owner
- [ ] Allow entering email address in Reply To field

View, Print, or Email Finished Reports
- [x] Format report
- [x] Include log
- [x] Include results
- [ ] Display format page

Format Page

Character set table: DEFAULT

Page length: 57

Page width: 80

Top margin: 0

Bottom margin: 0

View, Print, or Email Finished Notice Reports

Recipients:
- ( ) All
- ( ) Only those with email addresses
- (•) Only those without email addresses

OK Cancel

Choose load report according to items being loaded (NF, Fiction, etc.)

SirsiDynix Symphony WorkFlows

File Edit Wizards Helpers Modules Preference Tools Window Help

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks
- Report Session
- Schedule New Reports
- Scheduled Reports
- Finished Reports
- Item Search and Display
- Check Item Status
- Help

Schedule New Reports : Display Template Reports

Templates | Print Barcodes

Report name »	Date Created
Cache Load Bibliographic Records - DVD	6/21/2010,8:28
Cache Load Bibliographic Records - Easy	6/21/2010,8:28
Cache Load Bibliographic Records - Fiction	5/20/2010,10:14
Cache Load Bibliographic Records - JF	6/21/2010,8:27
Cache Load Bibliographic Records - NF	6/21/2010,8:27
Load Bibliographic Records - playaway	6/21/2010,8:27
Print User Barcodes (Batch) - Cache/Rich County	5/26/2010,14:19

Setup & Schedule | View | Modify | Copy | Remove... | Ownership (b) | Close (g)

start | RI-270.... | SirsiDyn... | OCLC C... | Microso... | SirsiDyn... | log - No... | 8:39 AM

Click Setup & Schedule

SirsiDynix Symphony WorkFlows

File Edit Wizards Helpers Modules Preference Tools Window Help

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks
- Report Session
- Schedule New Reports
- Scheduled Reports
- Finished Reports
- Item Search and Display
- Check Item Status
- Help

Schedule New Reports : Display Template Reports

Templates | Print Barcodes

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Cache Load Bibliographic Records - JF	6/21/2010,8:27
Cache Load Bibliographic Records - NF	6/21/2010,8:27
Load Bibliographic Records - playaway	6/21/2010,8:27
Print User Barcodes (Batch) - Cache/Rich County	5/26/2010,14:19

Setup & Schedule | View | Modify | Copy | Remove... | Ownership (b) | Close (g)

start | RI-270.... | OCLC C... | Microso... | SirsiDyn... | log - No... | 8:39 AM

Choose “Load” tab

SirsiDynix Symphony WorkFlows

File Edit Wizards Modules Preference Tools Window Help

SirsiDynix

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks

- Report Session
- Schedule New Reports
- Scheduled Reports
- Finished Reports
- Item Search and Display
- Check Item Status
- Help

Schedule New Reports : Schedule Cache Load Bibliographic Records - NF

Basic | Load | Postload | Print Loaded Title | OCR Call Number Label | Spine And Pocket Label

Report Name: Cache Load Bibliographic Records - NF

Description: Load bibliographic records into catalog.

Title: Cache Catalog Record Load - NF

Filter:

Schedule | Run Now (b) | Save As Template | Cancel

start | RI-270.pdf ... | SirsiDynix S... | OCLC Conn... | Microsoft O... | SirsiDynix S... | 8:41 AM

Choose Destination name with drop down in "File to load" area

SirsiDynix Symphony WorkFlows

File Edit Wizards Modules Preference Tools Window Help

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks
- Report Session
- Schedule New Reports
- Scheduled Reports
- Finished Reports
- Item Search and Display
- Check Item Status
- Help

Schedule New Reports : Schedule Cache Load Bibliographic Records - NF

Basic | Load | Postload | Print Loaded Title | OCR Call Number Label | Spine And Pocket Label

Input File

File to load:

File format: lr

Title Control Processing

Key Matching

Title control number matching rule: b

- Match on title control number
- Match on title control number or indexed MARC tag
- Match on title control number and indexed MARC tag

Title control number source for incoming items: ip

Indexed MARC tag number: i

☐ Compare multiple occurrences of a title control number field (not recommended)

Process bibliographic delete status

Matching MARC records that contain a "d" in the Leader/05 will be

- Deleted
- Listed
- Ignored
- Loaded

General information

Update date cataloged: NEVER

Default record format: MARC

Schedule | Run Now (b) | Save As Template | Cancel

start | RI-270.pdf ... | SirsiDynix S... | OCLC Conn... | Microsoft O... | SirsiDynix S... | 8:41 AM

Scroll down and choose “Run Now”

SirsiDynix Symphony WorkFlows

File Edit Wizards Modules Preference Tools Window Help

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks
- Report Session
- Schedule New Reports
- Scheduled Reports
- Finished Reports
- Item Search and Display
- Check Item Status
- Help

Schedule New Reports : Schedule Cache Load Bibliographic Records - NF

Basic | Load | Postload | Print Loaded Title | OCR Call Number Label | Spine And Pocket Label

Update date cataloged: NEVER
Default record format: MARC
Update title control information from title information entry:

Bibliographic Record Processing
- [ ] Update bibliographic record when updating records
- [x] Update publication year
- [ ] Remove entries listed in the file "junktag"

Remove subject headings:

Call Number And Copy Processing

Holdings entry preprocessing: None
Copy processing: o
Call number load rules: DEWEY,092,,N
Default holding code: CCL-NF
- [x] Update AUTO-assigned call numbers
- [x] Create/update price from holdings statement, 020 subfield c

Error Records

Error records: Load for review / Write to error file
Default review status: REVIEW
Library: USL

Schedule | Run Now (b) | Save As Template | Cancel

start | RI-270.pdf ... | SirsiDynix S... | OCLC C... | Microsoft O... | SirsiDynix S... | 8:43 AM

Choose "Display Finished Reports"

SirsiDynix Symphony WorkFlows

File Edit Wizards Modules Preference Tools Window Help

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks
- Report Session
- Schedule New Reports
- Scheduled Reports
- Finished Reports
- Item Search and Display
- Check Item Status
- Help

Schedule New Reports : Schedule Cache Load Bibliographic Records - NF

Schedule New Reports

Frequency: ASAP
Next run date:
Last run date: NEVER
Printer:
Email to:
Do not email notices to recipients with email addresses
Suspended: N
Place on list: Y
Notify owner: N
View type: Both result and log

Schedule a New Report | Display Scheduled Reports | Display Finished Reports | Close

Default record format: MARC
Update title control information from title information

Bibliographic Record Processing
- Update bibliographic record when updating recor
- Update publication year
- Remove entries listed in the file "junktag"

Remove subject headings:

Call Number And Copy Processing
Holdings entry preprocessing: None

Schedule | Run Now (b) | Save As Template | Cancel

If report doesn't appear use the "Bunny in the Hat" refresh helper

SirsiDynix Symphony WorkFlows

File Edit Wizards Helpers Modules Preference Tools Window Help

SirsiDynix

Cataloging | Circulation | Offline | Reports | Utility

Common Tasks

- Report Session
- Schedule New Reports
- Scheduled Reports
- Finished Reports
- Item Search and Display
- Check Item Status
- Help

Schedule New Reports : Display Finished Reports

Finished

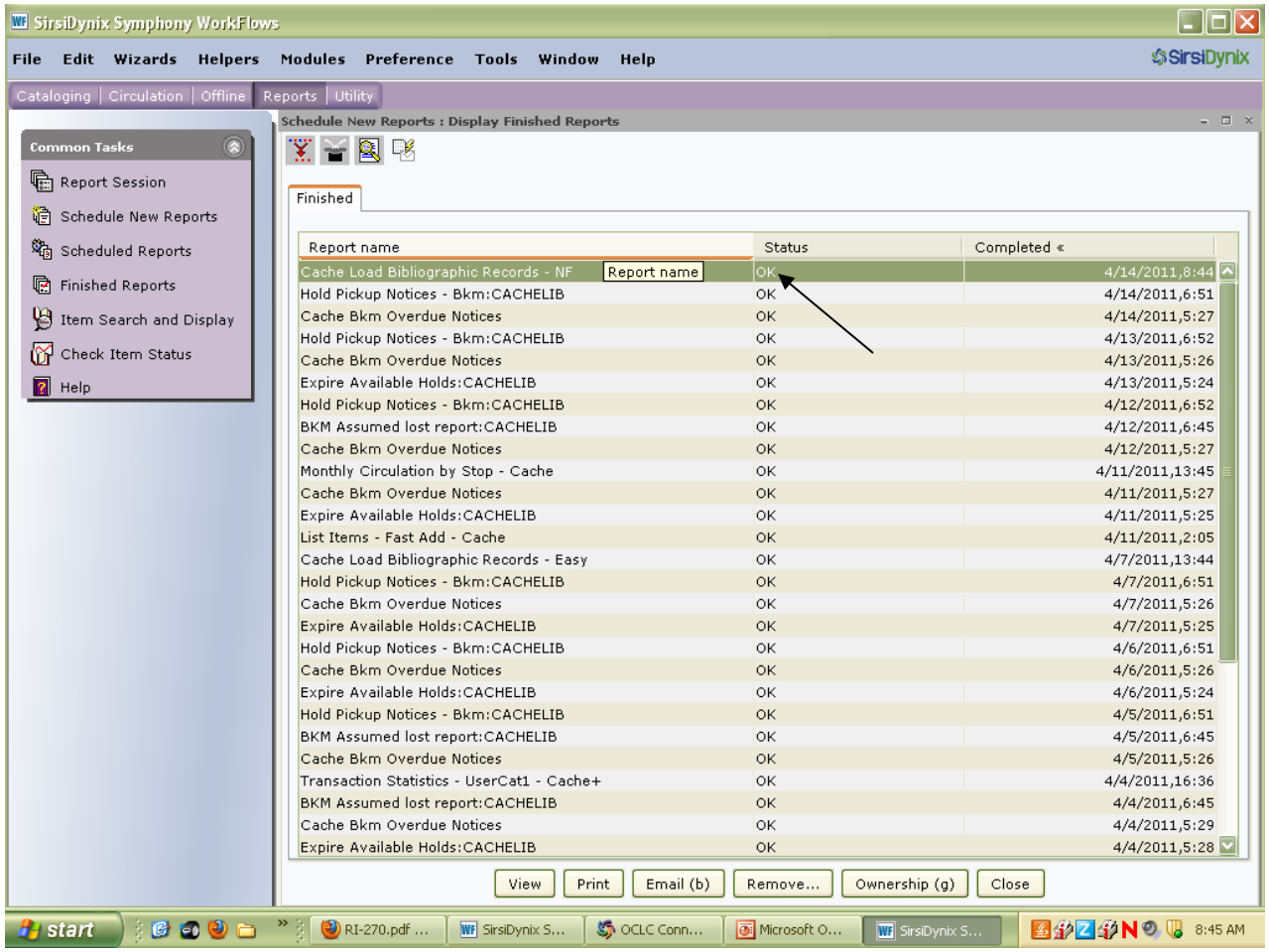
Report name

Report name	Status	Completed «
Cache Load Bibliographic Records - NF	OK	4/14/2011,8:44
Hold Pickup Notices - Bkm:CACHELIB	OK	4/14/2011,6:51
Cache Bkm Overdue Notices	OK	4/14/2011,5:27
Hold Pickup Notices - Bkm:CACHELIB	OK	4/13/2011,6:52
Cache Bkm Overdue Notices	OK	4/13/2011,5:26
Expire Available Holds:CACHELIB	OK	4/13/2011,5:24
Hold Pickup Notices - Bkm:CACHELIB	OK	4/12/2011,6:52
BKM Assumed lost report:CACHELIB	OK	4/12/2011,6:45
Cache Bkm Overdue Notices	OK	4/12/2011,5:27
Monthly Circulation by Stop - Cache	OK	4/11/2011,13:45
Cache Bkm Overdue Notices	OK	4/11/2011,5:27
Expire Available Holds:CACHELIB	OK	4/11/2011,5:25
List Items - Fast Add - Cache	OK	4/11/2011,2:05
Cache Load Bibliographic Records - Easy	OK	4/7/2011,13:44
Hold Pickup Notices - Bkm:CACHELIB	OK	4/7/2011,6:51
Cache Bkm Overdue Notices	OK	4/7/2011,5:26
Expire Available Holds:CACHELIB	OK	4/7/2011,5:25
Hold Pickup Notices - Bkm:CACHELIB	OK	4/6/2011,6:51
Cache Bkm Overdue Notices	OK	4/6/2011,5:26
Expire Available Holds:CACHELIB	OK	4/6/2011,5:24
Hold Pickup Notices - Bkm:CACHELIB	OK	4/5/2011,6:51
BKM Assumed lost report:CACHELIB	OK	4/5/2011,6:45
Cache Bkm Overdue Notices	OK	4/5/2011,5:26
Transaction Statistics - UserCat1 - Cache+	OK	4/4/2011,16:36
BKM Assumed lost report:CACHELIB	OK	4/4/2011,6:45
Cache Bkm Overdue Notices	OK	4/4/2011,5:29
Expire Available Holds:CACHELIB	OK	4/4/2011,5:28

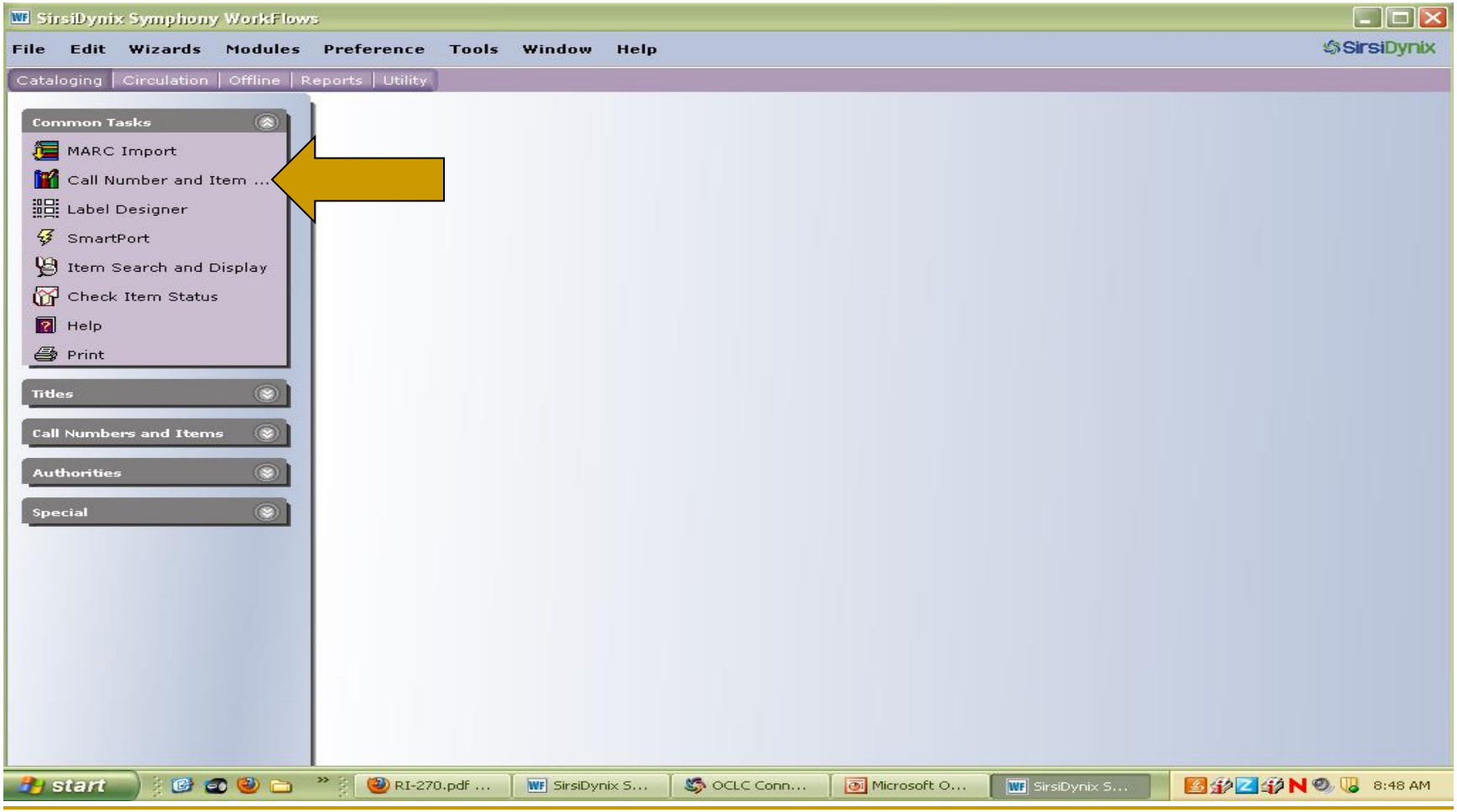
View | Print | Email (b) | Remove... | Ownership (g) | Close

start | RI-270.pdf ... | SirsiDynix S... | OCLC Conn... | Microsoft O... | SirsiDynix S... | 8:45 AM

If Status is OK you can close the report wizard (If there is an error phone Linda)



Now add the item ID and verify the item using Call# and Item Main. wizard



Delete original MARC file

- To keep things tidy delete the Export.dat file from the Desktop when you've finished.

Questions?

- Contact Linda Roholt at the Utah State Library
- 1-800-662-9150 ext. 754 or 801-715-6754
- lroholt@utah.gov

- Happy Cataloging!