Export preferences

Discover how to set preferences for general, international, TCP/IP, and Uniform Resource Identifiers (URIs) export in WorldShare Record Manager.

Before you can export a record, you must set up your export preferences.

1. In the left navigation, click **User Preferences**.
2. From the User Preferences screen, click **Exporting - Bibliographic Records**. The Exporting - Bibliographic Records accordion opens, revealing four tabs: General (default), International, TCP/IP, and Uniform Resource Identifiers (URIs).

Note:
- All exported bibliographic records will include embedded local bibliographic data fields.
- After setting preferences in General, International, TCP/IP, or Uniform Resource Identifiers (URIs), click **Reset Form** to restore original default settings.

Set preferences for general export

Exporting - Bibliographic Records accordion: General tab - Image

1. For Format, select a format for your export records from the drop-down list.
   - MARC 21 with MARC-8
   - MARC 21 with UTF-8 Unicode (default)
   - MARCXML with UTF-8 Unicode
   - MARC 21 with MARC-8 and LHR
   - MARC 21 with UTF-8 Unicode and LHR

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Bibliographic_records/Export_MARC_21_r...
2. In the Exclude Bibliographic Data area, you can:

- **Exclude an entire field** - In the Exclude Matching Field(s) area:
  a. Select the field to exclude from the Tag drop-down list.
  b. Select the `indicator(s)` the field contains from the Ind 1 and Ind 2 drop-down lists.

- **Remove a field that contains specific subfield(s)** - In the Exclude Matching Field(s) area:
  a. Select the field to exclude from the Tag drop-down list.
  b. Select the `indicator(s)` the field contains from the Ind 1 and Ind 2 drop-down lists.
  c. Select or enter the `subfield(s)` the field contains from the Subfield(s) drop-down list. This list contains an auto-suggest text field. Auto-suggestions for list-appropriate elements start with the first keystroke in the text field.

- **Exclude specific subfield(s) from a field** - In the Exclude Subfield(s) in Matching Field(s) area:
  a. Select the field that contains the subfields you want to exclude from the Tag drop-down list.
  b. Select the `indicator(s)` the field contains from the Ind 1 and Ind 2 drop-down lists.
  c. Select or enter the `subfield(s)` you want to exclude from the Subfield(s) drop-down list. This list contains an auto-suggest text field. Auto-suggestions for list-appropriate elements start with the first keystroke in the text field.

Note:

- Fields are excluded before the subfields.
- Add additional tags by clicking the `Add` button.
- Remove tags by clicking the `Remove` button.
- You can add up to 100 field exclusions for both whole field exclusions and subfield within a field exclusions.

3. Click **Save**.
Set preferences for international export

**Exporting - Bibliographic Records accordion: International tab - Image**

1. Click the **International** tab.
2. For Non-Latin Content Exported, select how Latin and Non-Latin content will appear in exported records from the drop-down list.
   - All data with Latin script in 880 fields
   - All data with other scripts in 880 fields
   - Latin script only
   - Other scripts only
3. For Diacritic Character Usage, select whether you want **Decomposed** or **Precomposed**.
   - Decomposed -
   - Precomposed -
4. For Warning, select **Warn before exporting bibliographic records that include unlinked non-Latin script fields** if you want the system to generate an error message before you export MARC 21 bibliographic records that include unlinked non-Latin script fields.
Set preferences for TCP/IP export

Note: Institutions with a firewall must configure it to recognize and accept data from the following IP address in order to export records directly from OCLC into an ILS: 132.174.100.234

Exporting - Bibliographic Records accordion: TCP/IP tab - Image

1. Click the TCP/IP tab.
2. For TCP/IP connection options, enter:
   1. **Host Name**: Enter the TCP/IP name (e.g., lib.domain.edu) or the numeric TCP/IP address of the host computer that runs your local system.
   2. **Port Number**: Enter the port number that will be used to receive the exported records
3. **Authentication** - Select an authentication method from the drop-down list.
   - None
   - **Login ID** - Enter the ID and password to access your local system. Select Mark Password if you do not want the password to be visible.
   - **User ID** - Enter the ID to access your local system. Select Mask ID if you do not want the ID to be visible.

3. For Connection Delay, select the **wait time**, in seconds, that occurs between each record sent in a batch from the drop-down list. The default wait time is 0.25 seconds.

4. For Connection Attempts, select the **maximum number of attempts** to retry connecting to the local system if the first connection attempt fails from the drop-down list. The default maximum number is 0.

5. For Gateway Export Response Messaging, click **Use Messaging** to enable messaging.
   - 1. If enabled, select the amount of time, in seconds, that messaging is displayed from the drop-down list. The default amount of time until timeout is 5 seconds.

6. Click **Save**.

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**Set preferences for Uniform Resource Identifiers (URIs) export**

Exporting - Bibliographic Records accordion: Uniform Resource Identifiers (URIs) tab - Image

1. For Name Headings Identity Services, select which name headings identity services to include with exported records.
   - **GND Authorities**
   - **LC/NACO Authority File**
2. For Subject Headings Identity Services, select which subject headings identity services to include with exported records.
   ◦ GND Authorities
   ◦ LC Subject Authority File
   ◦ MeSH Authorities