Set export preferences

Learn how to set export preferences in the simplified cataloging role in Record Manager.

Overview

This accordion allows you to set preferences for bibliographic record export. Export preferences must be set before exporting records.

1. In the left navigation, click **User Preferences**.
2. From the User Preferences screen, click **Exporting - Bibliographic Records**.

Note: After setting preferences in General, International, TCP/IP, or Uniform Resource Identifiers (URIs):

- Click **Reset Form** to restore original default settings.
- Click **Discard Page Changes** to discard the changes you made and retain your previous settings. A confirmation dialog displays to confirm the discardment. Click **Discard** to confirm and discard your changes.

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
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.

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   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.
   - 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**.

**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**

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