How do I set up MarcEdit OCLC Integration?

Last updated: Wed, 30 Jan 2019 21:10:58 GMT

The cataloging application MarcEdit’s integration with OCLC APIs enables several pieces of functionality within MarcEdit, including downloading records from WorldCat and setting or unsetting library holdings. In order to enable this integration, you must enter appropriate API credentials (WSKey, Secret, principalID, principalIDNS) into MarcEdit.

Please note that while OCLC supports the APIs that enable this integration (WorldCat Metadata API, WorldCat Registry/Configuration Platform Service, and WorldCat Search API), we do not support the MarcEdit application. We are happy to work with you to make sure your API credentials are set up correctly, but we do not support the functionality of MarcEdit itself.

Resolution
To set up MarcEdit Integration:

1. Make sure you have installed the latest version of MarcEdit.
2. When copying and pasting your credentials into MarcEdit, make sure you are not adding any leading or trailing spaces (or any other characters). We recommend using a plain text editor rather than a word processor like Microsoft Word for this purpose.
3. In MarcEdit, go to Preferences, and select the OCLC Integration tab. Start by entering your WSKey and Secret values, which you will obtain from OCLC WSKey Management.
   1. Log into WSKey Management using your WorldShare account.
   2. If you have not already obtained your WSKey, click Request a Production WSKey. Make sure you request a WSKey with access to the following Services:
      • WorldCat Metadata API
      • WorldCat Registry/Configuration Platform Service
      • WorldCat Search API
   3. Please see How to Request a WSKey for more information.
   4. Your WSKey request will take about two business days to process. Once your request is approved, or if you already have a WSKey, copy and paste the WSKey and Secret values into MarcEdit.
   5. If you have one WSKey with access to all of the above services, both "Key" values you need to copy into MarcEdit will be the same. If you have two WSKeys (one for the Metadata API and one for the Search API), they will be different. In the latter case, make sure the Secret you copy is the one associated with the Metadata API WSKey, and that this WSKey also has access to the WorldCat Registry/Configuration Platform Service.
4. Your principalID is a value that uniquely identifies your user account in WorldShare. You can access this value by looking yourself up in the WorldShare Admin panel. Once you locate your record, the principalID value is available under the Diagnostics tab. You will also find the principalIDNS (noted as namespace in WorldShare Admin) value there.
   1. In order for the integration to work, your account must have one of the following Cataloging roles:
• Cataloging Full
• Cataloging INST Admin
• Cataloging Limited
• Cataloging_Agent
• KB_ADMIN

2. These roles will only be available to your institution if you have activated Record Manager. Institutions with an OCLC Cataloging subscription may activate Record Manager by contacting orders@oclc.org. Please note that you may continue using Connexion even after activating Record Manager.

5. Enter your OCLC Symbol in the Institutional Code field. Then click Get Codes to obtain your branch-level holdings codes. These are used when setting holdings via the Metadata API.

6. After filling in all the fields, click Validate Keys. This will check your WSKey value(s) for accuracy and present any errors that may arise.

7. After validating your credentials, click Apply and then OK.

8. When you've completed these steps, you are now ready to access the OCLC Operations within MarcEdit.

9. If you get a 403 error when attempting to set or unset holdings, or write data to WorldCat, your account likely does not have appropriate permissions. Please double check that the account represented by your principalID has appropriate cataloging permissions and that you have entered the principalID and principalIDNS values correctly.

10. If your institution has multiple OCLC Symbols and you want to do work across those Symbols, your account as represented by the principalID value must have the Cataloging_Agent role.

11. If you have tried all these steps and you are still getting permissions errors, double check that the values you entered were saved correctly to the MarcEdit config.xml file.

Additional information
If you continue to experience issues after following the steps above please contact the OCLC Developer Network by emailing devnet@oclc.org.