



CARLI
I-Share

VOYAGER AND I-SHARE CATALOGING
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Consortium of Academic and Research Libraries in Illinois

Mission

The Consortium leads Illinois academic libraries to create and sustain a rich, supportive, and diverse knowledge environment that furthers teaching, learning, and research through the sharing of collections, expertise and programs.

Diverse Membership

135 member libraries

<http://www.carli.illinois.edu/membership/mem-libs>

90 I-Share participants

http://www.carli.illinois.edu/membership/i-share_part

- 12 public universities (3 are ARL libraries)
- 25 public community colleges or community college districts
- 37 liberal arts colleges and private doctoral/research universities
- 4 medical, nursing and health-related schools
- 8 seminaries and institutions for religious studies
- 4 special libraries: Abraham Lincoln Presidential Library, Illinois Math & Science Academy, Illinois State Library, The Newberry Library

Membership Benefits

- **E-resources licensing and subsidized resources**
<https://www.carli.illinois.edu/membership/benefits>
- **I-Share union catalog** <https://i-share.carli.illinois.edu/>
- **Illinois Library Delivery Service (ILDS)**
- **CONTENTdm Digital Collections** <http://collections.carli.illinois.edu/>
- **CARLI Support:** support@carli.illinois.edu
 - 217-244-7593, toll free 866-904-5843

Membership Benefits

- **Board of Directors, 9 Standing Committees, 3 Task Forces**
<https://www.carli.illinois.edu/governance/committee-directory>
- **Continuing education** <https://www.carli.illinois.edu/calendar>
- **Email discussion lists** <https://www.carli.illinois.edu/email-lists>
 - Announce
 - I-Share Announcement
 - Technical Services Interest Group, etc.

I-Share Members

- **ILS**
 - Currently Voyager 9.1.1
 - I-Share Next <https://www.carli.illinois.edu/products-services/i-share/next/faq>
- **Individual databases**
- **Local OPACs**
- **I-Share union catalog** <https://i-share.carli.illinois.edu/>



Local OPAC flavors

1. New VuFind

FAQ:

<https://www.carli.illinois.edu/products-services/i-share/opac/new-vufind-faq>

Report feedback:

feedback@carli.illinois.edu

Issues List:

<https://github.com/CARLI/vufind/issues>

2. VuFind 0.6

3. WebVoyage



OPAC bib updates comparison

OPAC Updates	WebVoyage	VuFind 0.6	New VuFind
Bibs in Local	Immediate	Current as of 6:45PM yesterday*	Current as of 10:20PM yesterday*
Bibs in UC	n/a	Current as of 6:45PM yesterday*	Current as of 9:00PM yesterday*



** A large amount of records loaded in a single day may need to be split over several days.*



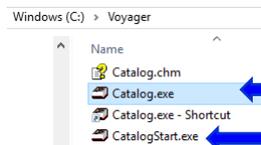
Voyager Cataloging Module Overview

Access the client:



Desktop icon

OR



Subsequent Voyager Cataloging access

1st time on a new installation of Voyager

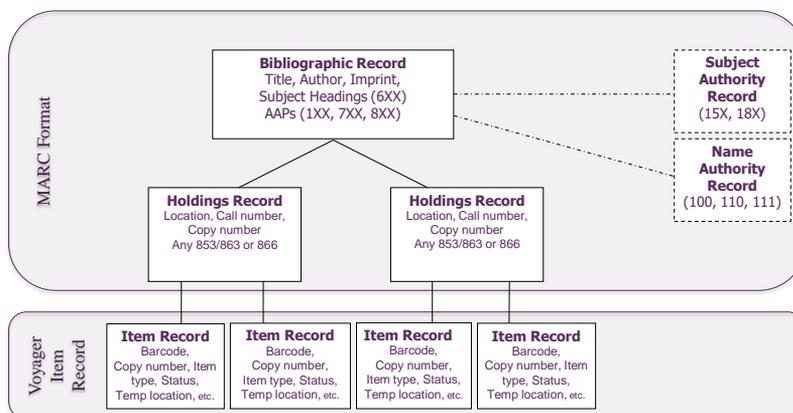
C:/Voyager/ image

Login instructions

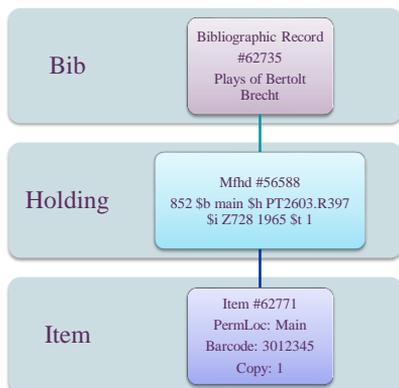
Follow along using your sample records

RECORD RELATIONSHIPS IN VOYAGER

Voyager uses MARC format for authorities, bibs, and holdings.



RECORD RELATIONSHIPS EXAMPLE #1: SINGLE VOLUME MONOGRAPH, ONE COPY



Back to Search Results | Cite this | Email this | Add to Favorites | Staff view

The plays of Bertolt Brecht / William Kenney.

Main Author: Kenney, W. P.
Published: New York : Monarch Press, c1955.
Series: Monarch notes ; 551
Topics: Brecht, Bertolt, 1898-1956.

Tags: No tags. Be the first to tag this record!

More Details | Location & Availability | User Reviews | Request Item

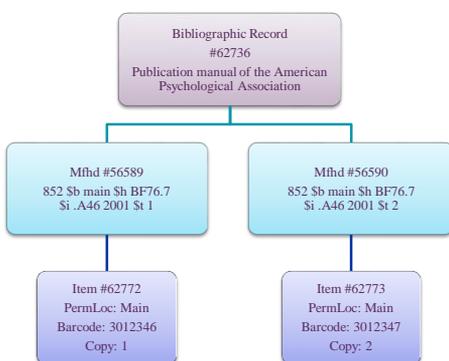
Bradley University

Location: General Collection - Basement
Call Number: PT2603.R397 Z7281965
Text me this call number

Copy: 1
Status: Available

To follow along, search by record number using the Record menu > Retrieve by record id > Bibliographic... / Holding... / Item...
Keystrokes: Alt-r-i-b, Alt-r-i-h, Alt-r-i-i

RECORD RELATIONSHIPS EXAMPLE #2A: SINGLE VOLUME MONOGRAPH, MULTIPLE COPIES



Publication manual of the American Psychological Association.

Published: Washington, DC : American Psychological Association, c2001.
Edition: 5th ed.
Topics: Psychology - Authorship - Handbooks, manuals, etc. | Social sciences - Authorship - Handbooks, manuals, etc. | Psychological literature - Publishing - Handbooks, manuals, etc. | Social science literature - Publishing - Handbooks, manuals, etc. | Writing. I. Authorship. I. Journalism, Medical.
Tags: No Tags. Be the first to tag this record!

More Details | Location & Availability | Table of Contents | User Reviews | Published Reviews | Request Item

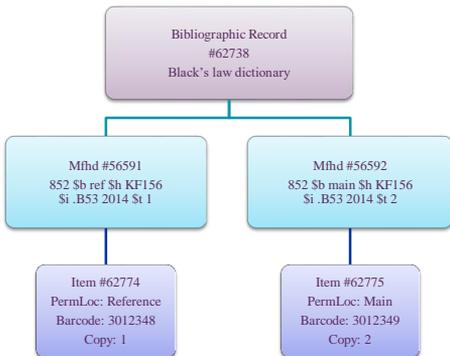
Joliet Junior College

Location: Stacks
Call Number: 808.02 P960 2001
Text me this call number
Status: Available

Location: Stacks
Call Number: 808.02 P960 2001
Text me this call number
Copy: 2
Status: Available

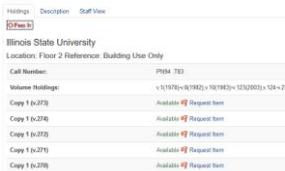
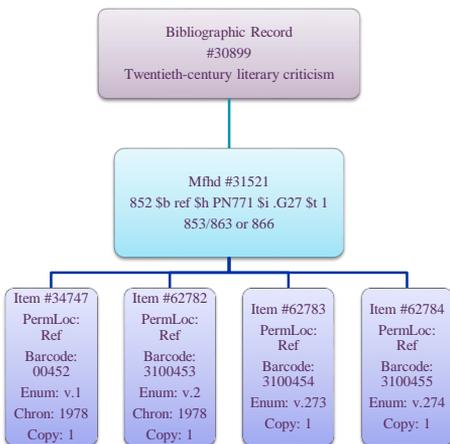
Each copy should be represented by its own holding record, and the copy number should be included in both the holding (852 \$t) and the item (Copy). Including the copy number in both places helps with consistent display in discovery layers and on circ notices.

RECORD RELATIONSHIPS EXAMPLE #2B: SINGLE VOLUME MONOGRAPH, MULTIPLE COPIES & LOCATIONS



Two copies: one in reference, one in main stacks.

RECORD RELATIONSHIPS EXAMPLE #3: SERIAL OR MULTI-VOLUME MONOGRAPH



RECORD RELATIONSHIPS EXAMPLE #4A: SERIAL OR MULTI-VOLUME MONOGRAPH, TWO COPIES, ONE LOCATION

```

graph TD
    BR[Bibliographic Record  
Twentieth-century literary criticism] --> M1[Mfhd  
852 $b ref $h HD123 $i .A45 $t  
1  
853/863 or 866]
    BR --> M2[Mfhd  
852 $b ref $h HD123 $i .A45  
$t 2  
853/863 or 866]
    M1 --> I1[Item  
PermLoc:  
Ref  
Barcode:  
30000987  
654321  
Enum: v.7  
Chron:  
1982  
Copy: 1]
    M1 --> I2[Item  
PermLoc:  
Ref  
Barcode:  
30000987  
654322  
Enum: v.8  
Chron:  
1982  
Copy: 1]
    M1 --> I3[Item  
PermLoc:  
Ref  
Barcode:  
3000098765  
4341  
Enum: v.10  
Chron:  
1983  
Copy: 1]
    M2 --> I4[Item  
PermLoc:  
Ref  
Barcode:  
30000987  
654342  
Enum: v.9  
Chron:  
1983  
Copy: 2]
    
```

Twentieth-century literary criticism.

Published: Detroit, Mich. : Gale Research Co., ©1978-

Topics: Literature, Modern - 20th century - History and criticism - Periodicals. | Literature, Modern - 19th century - History and criticism - Periodicals. | Littérature - 20e siècle - Bibliographie. | Littérature - 20e siècle - Histoire et critique. | Letterkunde.

Genres: Criticism, interpretation, etc. | Periodicals.

Tags: No Tags. Be the first to tag this record! [Add](#)

More Details | **Location & Availability** | User Reviews | Request Item

Illinois State University

Location: Floor 2 Reference: Building Use Only

Call Number: P994 .T83

Text me this call number

Copy: 1

Library Has (Summary): v.1(1978)-v.8(1982),v.10(1983)-v.123(2003);v.124-v.274

Indexes: v.1-v.249,v.1-v.265

Status: Available

Location: Floor 2 Reference: Building Use Only

Call Number: P994 .T83

Text me this call number

Copy: 2

Library Has (Summary): v.9(1983)

Status: Available

RECORD RELATIONSHIPS EXAMPLE #4B: SERIAL OR MULTI-VOLUME MONOGRAPH, TWO COPIES & LOCATIONS

```

graph TD
    BR[Bibliographic Record  
#62739  
Mississippi River Navigation] --> M1[Mfhd #56593  
852 $b ref $h HE630.M6 $i .A5  
$t 1  
853/863]
    BR --> M2[Mfhd #56593  
852 $b govdocs  
$h D103.302:N22/ $t 2  
866]
    M1 --> I1[Item #62776  
PermLoc:  
Ref  
Barcode:  
312340  
Enum: 1959  
Copy: 1]
    M1 --> I2[Item #62777  
PermLoc:  
Ref  
Barcode:  
312341  
Enum: 1960  
Copy: 1]
    M2 --> I3[Item #62780  
PermLoc:  
Main  
Barcode:  
312342  
Enum: 1961  
Copy: 2]
    M2 --> I4[Item #62781  
PermLoc:  
Main  
Barcode:  
312343  
Enum: 1962  
Copy: 2]
    
```

Mississippi River navigation.

Corporate Authors: United States. Mississippi River Commission. United States Army. Corps of Engineers.

Format: Journal / Magazine

Language: English

Published: Vicksburg, Miss.

Subjects: Mississippi River > Navigation.

Tags: No Tags. Be the first to tag this record! [Add Tag](#)

Holdings | Description | Staff View

Southern Illinois University Carbondale

Location: LC Books: (A-HG: 6th fl.) (H4-T: 5th fl.) (TA-Z: 4th fl.)

Call Number: HE630 M6 M6x

Volume Holdings:

1959

Copy 1 Available [Request Item](#)

[Cite this](#) [Text this](#) [Email this](#) [Export Record](#) [Save to List](#)

Location: Government Documents, 3rd Floor

Call Number: D103.302 N22

Volume Holdings:

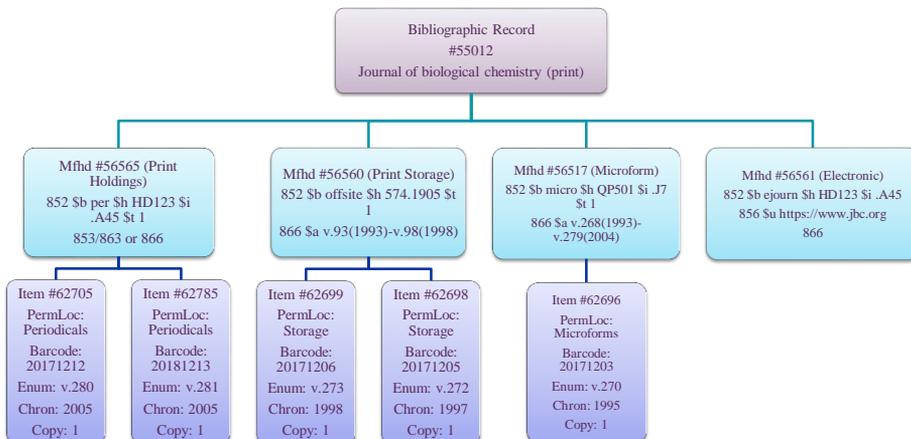
1959
1961
1960
1964
1962

Copy 1 (1960) Available [Request Item](#)

Copy 1 (1967) Available [Request Item](#)

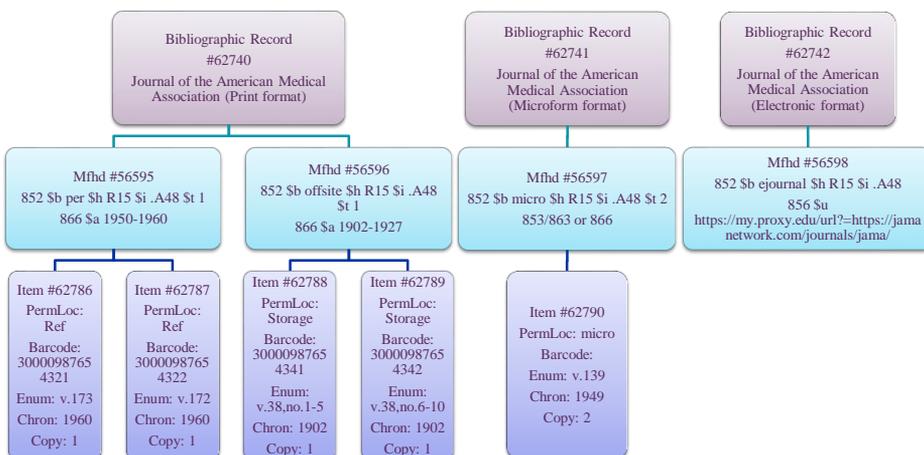
Copy 1 (1965) Available [Request Item](#)

RECORD RELATIONSHIPS EXAMPLE #5A: SERIAL, MULTIPLE FORMATS (SINGLE BIB APPROACH)



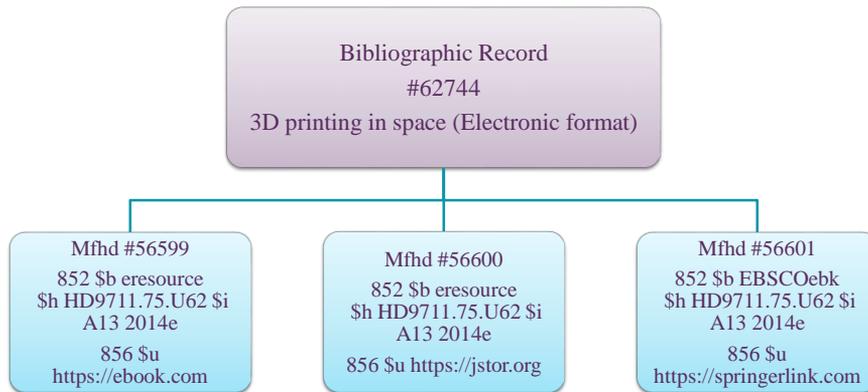
The single bib record approach, which may apply to both serials and monographs. Note that electronic resources should not have item records.

RECORD RELATIONSHIPS EXAMPLE #5B: MULTIPLE BIBS FOR MULTIPLE FORMATS



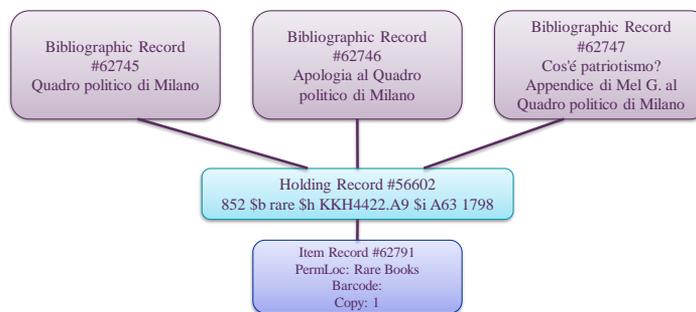
CARLI's Cataloging Electronic Resources/Electronic Resource Display in the OPAC recommendations R1 and R2 advise using separate bibs for different formats of a resource. This approach will be beneficial for migration to I-Share Next.

RECORD RELATIONSHIPS EXAMPLE #6: ELECTRONIC RESOURCE, MULTIPLE SERVICES (PROVIDER NEUTRAL)



Libraries may have different practices for identifying a holdings "location" for electronic resources. Some may use a single location for all e-resources; some may distinguish e-resources by type (ebook, streaming media, ejournals, etc.); and some create locations for each provider, platform, or collection.

RECORD RELATIONSHIPS EXAMPLE #7, BOUND-WITH



Bound withs are physical resources that contain multiple distinct works in the same medium (e.g., books, microforms, etc.), usually combined post-publication.

Voyager bound withs feature a holding and item(s) that are linked to two or more bibs, such that each work is described by a full record. (A.K.A. "analytic cataloging")

Session Defaults and Preferences

- Enable functions of the client to work properly



deSousa, Joe (2015). *Gears*. [Photograph]. Retrieved from Flickr .
Public domain.

- Allow individual customization
 - Client capabilities
 - Time-saving features
 - Display



Gadal, Damian (2008). *Flaming Whelels*. [Photograph]. Retrieved from Flickr
<http://tinyurl.com/gns4qt>. CC by 2.0. Some rights reserved.

- Settings are saved to your computer, not your operator id
- Backup your settings
 - Tracking chart:
https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/catpreftrack_911.doc
 - Documentation:
https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/catprefpics_ver911.pdf
- ✓ Set your configurations with me
(Options menu – Preferences)

Classification Scheme Default Settings

The screenshot shows the 'Cataloging - Policy Definitions' window with the 'Locations' tab selected. The 'Available Locations' list includes 'College-Media Scheduling', 'Electronic Collections', 'Electronic Resources test', 'Huvudbiblioteket', 'Library Technology Center', and 'Library-Media Scheduling'. The 'Selected Locations' list includes 'Juvenile Education (r)', 'Main', 'Media Department', 'Media Stacks', 'Microform Room', and 'Music Stacks'. A red arrow points from 'College-Media Scheduling' to 'Main'. Below the lists, the 'Classification Scheme Default' is set to 'Library of Congress'.

System Administration Module – Cataloging – Policy Definitions – Locations tab

Call Number Hierarchy

Cataloging - Call Number Hierarchy

Codes	Names
Dewey	Dewey
LC	Library of Congress
NLM	NLM
NONE	No Call Number
Other	Other

Edit Call Number Hierarchy:

Hierarchy:

Ind1	Ind2	Field	SubFld	Cutter-SubFld
*	*	090	a	b
*	*	050	a	b
*	*	090	a	
*	*	050	a	

Priority

System Administration Module – Cataloging – Call Number Hierarchy – Call Number Tab

Import/Replace Duplicate Detection Profiles

Profile	Actions
None 	Adds imported record to the database without notifying operator of duplicates. Default option.
OCLCConditional 	Adds the imported record to the database if no duplicate is found. Notifies if duplicate records found and allows operator to choose next course of action. <i>*Recommended setting for manual imports in the Cataloging client.</i>
OCLCReplace	Replaces the existing record in the database if only one duplicate. If more than one duplicate, notifies of all duplicate bibliographic record IDs and allows operator to choose next course of action.
OCLCCondBulk	Used with the bulk import function.

OCLC Conditional Duplicate Detection Profile Tab

Cataloging - Bibliographic Duplicate Detection Profiles

Codes	Names
OCLCCON	OCLCConditional
OCLCCONB	OCLCCondBulk
OCLCREP	OCLCReplace

New Edit Delete

Edit Bibliographic Duplicate Detection Profile:

Profile | Field Definitions

Profile Name: Profile Code:

Duplicate Handling:

Add-Unconditional Replace Add-Conditional Merge Bi-Directional Merge

Discard incoming records that do not match existing records

Cancellation:

None OCLC RLIN

Duplicate Replace: Duplicate Warn:

System Administration Module – Cataloging – Bibliographic Duplicate Detection Profiles – Profile tab

OCLC Conditional Duplicate Detection Field Definitions Tab

Cataloging - Bibliographic Duplicate Detection Profiles

Codes	Names
OCLCCON	OCLCConditional
OCLCCONB	OCLCCondBulk
OCLCREP	OCLCReplace

New Edit Delete

Edit Bibliographic Duplicate Detection Profile:

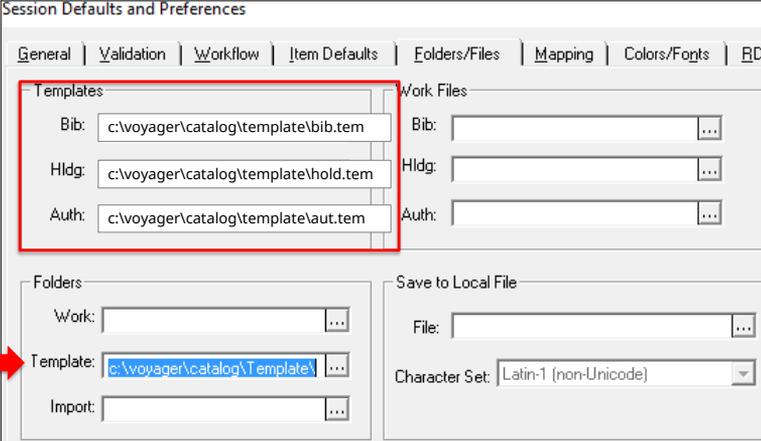
Profile | Field Definitions

Code	Available Indexes	Code	Selected Indexes	Field	Subfield
000D	Publication Date(008)	024I	ISBN-13 (024a)		
008L	Language(008 coded)	028A	Publisher Number (028a)		
008P	Publication Place(008 coded)	0350	System Number for deducing (035a)		
010A	LCCN (010a)	035A	System Number (035a)	019	a
010Z	LCCN (010z): Cancelled/Invalid	BBID	Bibliographic Record ID		
019A	OCLC Number (019a): Cancelled		ISBN (ISBN-13)		

Field Override: Sub Field Override: Field Weight:

System Administration Module – Cataloging – Bibliographic Duplicate Detection Profiles – Field Definitions tab

Template Configuration: Auto-generate Specified Template



Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | BD

Templates

Bib: c:\voyager\catalog\template\bib.tem

Hldg: c:\voyager\catalog\template\hold.tem

Auth: c:\voyager\catalog\template\aut.tem

Work Files

Bib: ...

Hldg: ...

Auth: ...

Folders

Work: ...

Template: c:\voyager\catalog\Template\ ...

Import: ...

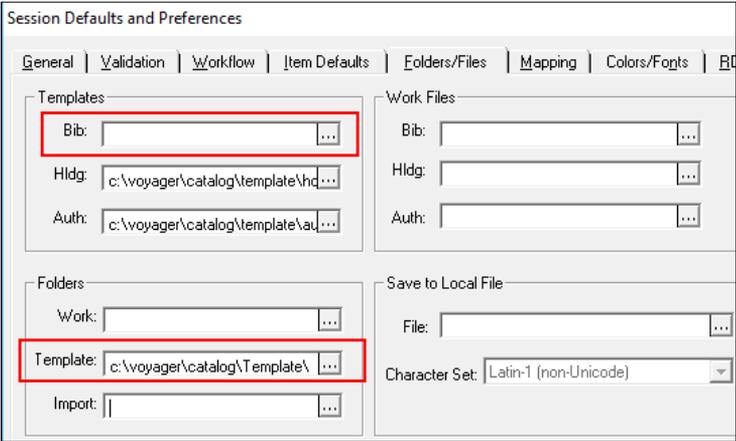
Save to Local File

File: ...

Character Set: Latin-1 (non-Unicode)

Cataloging Module – Options – Preferences – Folders/Files Tab - Templates

Template Configuration: Choose from All Templates



Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | BD

Templates

Bib: ...

Hldg: c:\voyager\catalog\template\hd...

Auth: c:\voyager\catalog\template\au...

Work Files

Bib: ...

Hldg: ...

Auth: ...

Folders

Work: ...

Template: c:\voyager\catalog\Template\ ...

Import: |

Save to Local File

File: ...

Character Set: Latin-1 (non-Unicode)

*Works with **New** button on toolbar*

Import Configuration

Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | RDA

Templates

Bib: c:\voyager\catalog\template\bib...

Hldg: c:\voyager\catalog\template\hld...

Auth: c:\voyager\catalog\template\au...

Work Files

Bib: ...

Hldg: ...

Auth: ...

Folders

Work: ...

Template: c:\voyager\catalog\Template\...

Import: c:\OCLC Downloads\...

Save to Local File

File: ...

Character Set: Latin-1 (non-Unicode)

Works with **Record** menu – **Import**

Your Import path: C:\Users\train#\Desktop\Cataloging Import Files
(#=number on computer)

Work Files Configuration

Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | RDA

Templates

Bib: c:\voyager\catalog\template\bib...

Hldg: c:\voyager\catalog\template\hld...

Auth: c:\voyager\catalog\template\au...

Work Files

Bib: c:\voyager\catalog\workfolder\nms.bib

Hldg: c:\voyager\catalog\workfolder\nms.hld

Auth: c:\voyager\catalog\workfolder\nms.aut

Folders

Work: c:\voyager\catalog\workfolder\...

Template: c:\voyager\catalog\Template\...

Import: c:\OCLC Downloads\...

Save to Local File

File: ...

Character Set: Latin-1 (non-Unicode)

Works with **Save** and **Open** buttons on toolbar

Save Plus Configuration

Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | RD

Templates

Bib: c:\voyager\catalog\template\bit...

Hldg: c:\voyager\catalog\template\hdc...

Auth: c:\voyager\catalog\template\au...

Work Files

Bib: c:\Voyager\Catalog\workfolder\nm...

Hldg: c:\Voyager\Catalog\workfolder\nm...

Auth: c:\Voyager\Catalog\workfolder\nm...

Folders

Work: c:\voyager\catalog\workfolder\...

Template: c:\voyager\catalog\Template\...

Import: c:\OCLC Downloads\...

Save to Local File

File: c:\voyager\catalog\workfolder\saveplus...

Character Set: MARC21 UTF-8

Activates **Save Plus** button on toolbar

Enable Automatic Update of Item Location and Item Type

- ✓ Update permanent location of attached items when MFHD is saved to the database
- ✓ Update item type of attached items when MFHD is saved to the database (based on item location definitions)

Suppress confirmation message upon successful save

Update permanent location of attached items when MFHD is saved to the database

Update item type of attached items when MFHD is saved to the database (based on item location definitions)

Cataloging Module – Options – Preferences – Workflow tab

Configure Automatic Update of Item Location and Item Type in SysAdmin

Set Initial Default Item Types for all selected locations

Edit Policy Definition:

Policy | Locations | Default Policies | Duplicate Detection

Available Locations: Campus Distribution, EIU Circulation Desk mmm

Selected Locations: ACQUISITIONS, Art and Music, B King, Baldacci, Best Sellers - Atrium, BTC Audiobooks

Routing Location Classification Scheme Default: Library of Congress

Cataloging Location Other NUC Code:

Initial Default ItemType: Book 16-4W

System Administration Module – Cataloging tab –
Policy Definitions – Locations tab

Automatically Update Item Location and Item Type when Updating MFHD Location

Tag	I1	I2	Subfield Data
852	0	1b	storagenc

Tag	I1	I2	Subfield Data
852	0	1b	art 1h



Bib ID	Title	Owning Library
210726	Sonata, flute and piano / Francis Poulenc.	EIU
MFHD ID	Location	Call Number
222229	Storage - Non-Circ	M242.P68x S86
Item ID	Location	Item Type
1513359	Storage - Non-Circ [P]	Book non-circulating
1513358	Storage - Non-Circ [P]	Book non-circulating
380630	Storage - Non-Circ [P]	Book non-circulating

Bib ID	Title	Owning Library
210726	Sonata, flute and piano / Francis Poulenc.	EIU
MFHD ID	Location	Call Number
222229	Art and Music	M242.P68x S86
Item ID	Location	Item Type
1513359	Art and Music [P]	Book 16-4W
1513358	Art and Music [P]	Book 16-4W
380630	Art and Music [P]	Book 16-4W

Automatically Update Item Location and Item Type when Updating MFHD Location

Tag	I1	I2	Subfield Data
852	0		\$b art \$h M242.P68x \$i S66 \$t 1

Title: Sonata, flute and piano / Francis Poulenc.

Location: Art and Music **Call #:** M242.P68x S66

Barcode: 32211130199464 Temp. Loc.:

Perm. Loc.: Art and Music Temp. Type:

Item Type: Book 16-4W Media Type:

Font Size Configuration

Font size: 8 – 72 points; type sizes larger than 12

Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | BDA

MARC Views (variable fields)

Bibliographic: Sample
Holdings: Sample
Authority: Sample
Conversion: Sample
Flow Marker Symbol:

Record Hierarchy

Bibliographic: Sample Holdings: Sample
Item: Sample Bound With: Sample

Global Heading Change Hierarchy

Level 1: Old Heading: Sample
Level 2: New Heading: Sample
Level 3: Auth Heading: Sample

Search Result Colors

Suppressed Records: Sample

Font

Name: Arial Unicode MS
Size: 12
Bold:

Configuring Link to RDA Toolkit

Cataloging - RDA Toolkit

Edit RDA Toolkit Options

Enable RDA Toolkit Links

Username: _____

Password: _____

Base URL: <http://access.rdatoolkit.org/?encode=marc&rec=>

Leave Username and Password blank if you use IP authentication or if your Cataloging operators have their own username/password.

Save Cancel

Select to enable RDA toolkit in the Cataloging client

Only enter if institution-level login; leave blank if IP or individual-level logins

System Administration Module – Cataloging tab – RDA Toolkit

Session Defaults and Preferences

Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | **RDA Toolkit**

Username: _____

Password: _____

Individual-level username/password

Cataloging Module – Session Defaults and Preferences – RDA Toolkit

Show RDA Toolkit

1. Place cursor in a row, tag, indicator, or subfield
2. Select [Shift + F2] or Edit menu – Show RDA Toolkit

File Edit Record Display Options Window Help

Insert Field Before F3

Insert Field After F4

Delete Field Del

Unselect text F11

Insert Subfield F9

Edit Cell FB

Special Character Entry Ctrl+E

Special Character Mode Ctrl+D

Show MARC Values F2

Show RDA Toolkit **Shift+F2**

Show Holdings Locations Ctrl+L

Insert URL from Browser Ctrl+U

042 1a kcac

050 0 0 1a PS3564.LU45 1b D63 1993

082 0 0 1a B117.54 12 20

049 1a IADA

100 1 1a Numeroff, Laura Joffe.

245 1 0 1a **Ops don't wear sneakers / jc by Laura Numeroff ; illustrated by New York : b Simon & Schuster Books for Young Readers, 2010.**

260

RDA Toolkit

MARC to RDA

MARC 21 Field Tag: 245 Subfield Code: a

Core SubElement: Title Proper

MARC 21 Field Tag: 245 Subfield Code: b

SubElement: Other Title Information

MARC 21 Field Tag: 245 Subfield Code: c

SubElement: Other Title Information

MFHD MARC tab – Suppress from OPAC

MARC | System | Bib Title(s) | History |

Suppress from OPAC

Leader | 00771cx a22001934 4500

005 | 20171204123106.0 | 00z |

008 | 100715 4 u _ 8 _ 1 001 u u _ 0 901128

Tag	I1	I2	Subfield Data
852	8		#b stacks #h TEST #i RECORDS #t 1

Holdings and Items for bib 196803

Bib ID	Title	Owning Library
196803	ILCSO test record.	AUG

MFHD ID	Location	Call Number	Order Status
(237665)	Stacks	TEST RECORDS	

Item ID	Location	Item Type	Enum/Chron/Year	Copy
267892	Stacks [P]	Books (Circ)	v.1 (1909)-v.45 (1954) Enum test Chron test	1
263939	Stacks	TEST RECORDS		
Item ID	Location	Item Type	Enum/Chron/Year	Copy
285334	Stacks [P]	Books (Circ)		2

OPAC will hide suppressed MFHD and item for copy 1.

OPAC will display unsuppressed bib plus MFHD, and item for copy 2

Suppress MFHD from OPAC (cont.)

ILCSO test record.

Published: Champaign, IL : ILCSO Office, 2003.
 Online Access: <http://www.carli.illinois.edu>

More Details | **Location & Availability** | User Reviews | Rec It

Augustana College
Location: Stacks
Call Number: TEST RECORDS
 Text me this call number
Copy: 2
Status: Available

VuFind 0.6

OPACs hide suppressed MFHD and item information for copy 1

ILCSO test record.

Format: Book
 Language: English
 Published: Champaign, IL : ILCSO Office, 2003.
 Online Access: <http://www.carli.illinois.edu>

Holdings | Description | Staff View

Augustana College

Location: Stacks

Call Number: TEST RECORDS
Copy 2 Available Request Item

New VuFind

SysAdmin Location Suppress in OPAC

Voyager System Administration

File Functions Help

System - Locations

Codes	Names	Owning Library
ACQ	ACQUISITIONS	Training Master DB
Bacq	ACQ BRANCH LIB	Branch Library
Bcat	CATALOGING BRANCH LIB	Branch Library
Bcirc	CIRC BRANCH LIB	Branch Library
Bgen	Branch General	Branch Library

Edit Location:

Code: Bacq

Name: ACQ BRANCH LIB

Spine Label Name:

OPAC Display Name: Other Branch Acquisitions Desk

Owning Library: Branch Library

Suppress in OPAC

System Administration Module – System – Locations
Not retroactive!

MFHD 56526: try to remove Suppress from OPAC and Save to DB

OCLC Connexion - [Online WorldCat: Morbidity and mortality weekly report]

OCLC 33990208 Held by IAD - 180 other holdings

Continuing Resources Rec stat c Entered 19960104 Replaced 20060202164543.503

Type a ELVI Sice d GPub f Ctr Lang eng

BLVL s Form s Conf 0 Freq u MRec Ctry gau

S/L 0 Orig EntW Regl u Alph

Desc a SITp Cont s DtSt d Dates 1994 1997

Leader elements

006		m	m f
007		c #b o #d c #e g #f u	
010		sn 95043847	
040		WAW #c WAW #d OCL #d GPO #d IUL #d DLC #d OCL #d AGL #d OCLC #d IUL #d GPO	
037		#b Supt. of Docs., U.S. Govt. Print. Off., Washington, D.C. 20402	
042		lc	
043		n-us---	
050	0 0	RA407.3	
060	4	W2 A N25M6	
074		0504-W-01	
086	0	HE 20.7039/3:	
090		#b	
049		IADA	

Delete Holdings: Export Label Produce Submit Replace Report Error Update Holdings Validate

Workflow-In Process Inst-IAD INS 14.41

LC Connexion - [Online WorldCat: morbidity and mortality weekly report]

e Cataloging Authorities Edit Action Batch View Tools Window Help

C 33990208 Held by IAD - 180 other holdings

Continuing Resources Rec stat c Entered 19960104 Replaced 20050202164543.503

Type a ELYI Src d GPub f Ctr Lang eng
 BLvl s Form s Conf 0 Freq u MRec Ctry gau
 S/L 0 Orig EntW Regl u Alph
 Desc a SFTp Conf s DtSt d Dates 1994 , 1997

008 m m f

007 c #b o #d c #e g #f u

010 sn 95043847

040 WAU #c WAU #d OCL #d GPO #d IUL #d DLC #d OCL #d AGL #d OCLCQ #d IUL #d GPO

037 #b Supt. of Docs., U.S. Govt. Print. Off., Washington, D.C. 20402

042 lc

043 n-us—

050 0 0 RA407.3

060 4 W2 A N25M6

074 0504-W-01

086 0 HE 20.7039/3:

090 #b

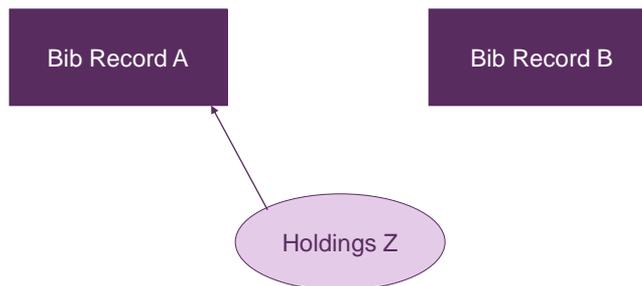
049 IADA

Holdings- Export- Label- Produce- Submit- Replace- Report Error- Update Holdings- Validate-
 Workflow-In Process Inst-IAD INS 14:41

008 elements

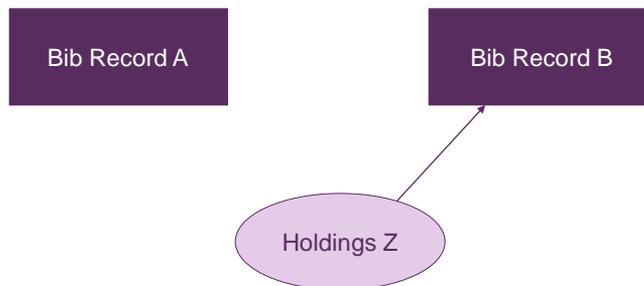
Relinking MFHDs

Before the move:



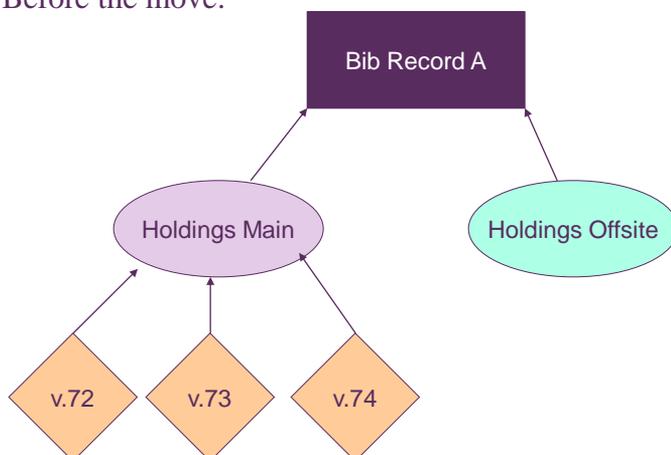
Relinking MFHDs

After the move:



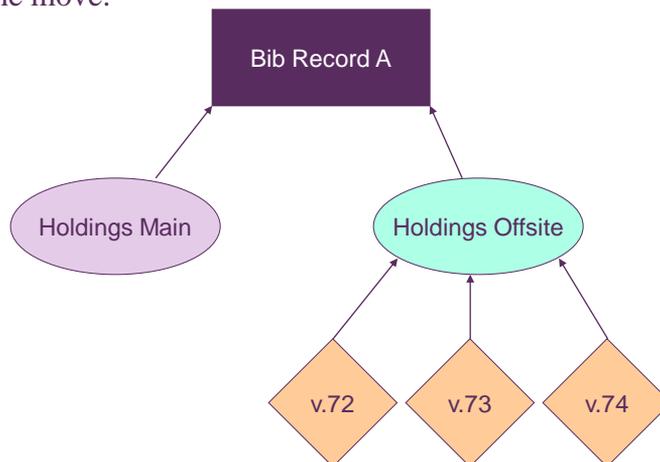
Relinking Item Records

Before the move:

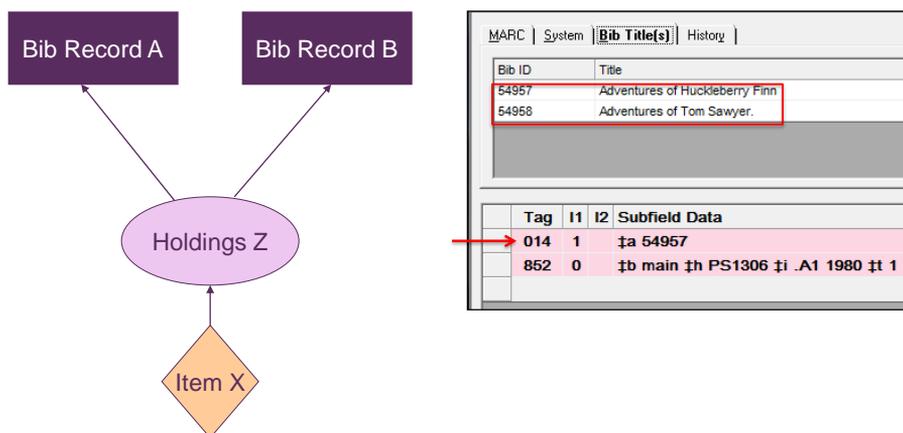


Relinking Item Records

After the move:



Bound-Withs



Bound-With Record Hierarchy

Holdings and Items for bib 54958

Bib ID	Title	Owning Library				
54958	Adventures of Huckleberry Finn	Training Master DB				
MFHD ID	Location	Call Number	Order Status			
56262	Main	PS1306 .A1 1980				
Item ID	Location	Item Type	Enum/Chron/Year	Copy	Item Status	
Bound With						
Bib ID	Title					
54957	Adventures of Huckleberry Finn					
54958	Adventures of Tom Sawyer.					
62463	Main [P]	book		1	Not Charged	

“On the Fly” Records Template in the Circulation Client

Add Bib/Item

Bib	Holdings	Item
Template: Book		
Date: 2000		
Place: No place, unknown, or undetermined		
Language: English		
ISBN: <input type="text"/>	OCLC Number: <input type="text"/>	
Author: <input type="text"/>		
Title: <input type="text"/>		
Series: <input type="text"/>		
Edition: <input type="text"/>	Pub Number: <input type="text"/>	
Place: <input type="text"/>	Publisher: <input type="text"/>	
LCCN: <input type="text"/>		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

<https://www.carli.illinois.edu/products-services/i-share/circ/secure/VoyBibTemplates>

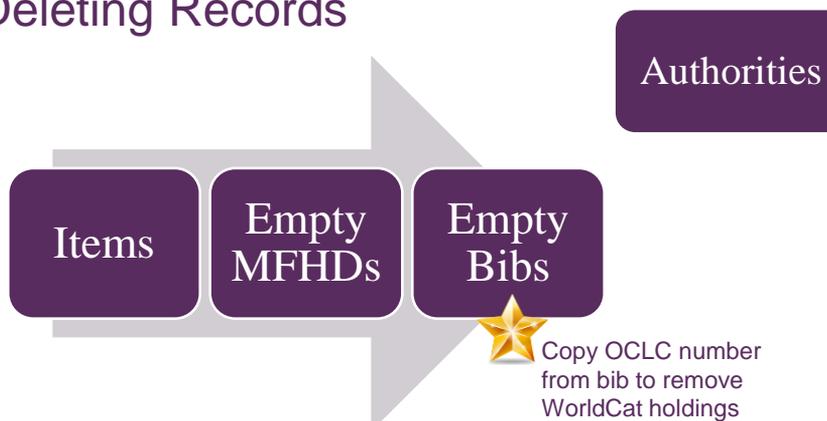
Order Records Template in the Acquisitions Client

The screenshot shows the 'Add Bib/Item' dialog box in the Voyager Acquisitions client. The dialog is titled 'Purchase Order: [cg186 - (Pending)]'. It contains several fields for bibliographic information:

- Template: Book
- Date: 2006
- Format: Book
- EPlace: Illinois
- Language: English
- ISBN: (empty)
- OCLC Number: (empty)
- Author: (empty)
- Title: [Example bib.]
- Series: (empty)
- Edition: (empty)
- Pub Number: (empty)
- Place: (empty)
- Publisher: (empty)
- LCCN: (empty)
- Supp from UC: nouc (highlighted with a red box)

 At the bottom, there are 'OK' and 'Cancel' buttons. Below the dialog, a toolbar contains several buttons: 'Add Line (Bib Search)', 'Add Line (Bib Import)', 'Add Line (Template)', 'Quick Line Item...', and 'Detailed Line Item...'. An arrow points from the 'Supp from UC' field to the 'Add Line (Template)' button.

Deleting Records



- Cannot delete if
 - Purchase Orders attached
 - Transactions pending (on reserve, checked out)

Deleted record files in your ftp

4 monthly delete files

- deleted_bibs_yyyy_mmm.csv (OCLC#, title, etc.)
- deleted_mfhs_yyyy_mmm.csv (852 bkhiml)
- deleted_items_yyyy_mmm.csv (26 fields)
- deleted_record_counts_yyyy_mmm_xxx.txt (# of each record type deleted)

Files removed from server after 2 months!

Additional information:

<https://www.carli.illinois.edu/products-services/i-share/cat/recdelete>

Accessing your CARLI ftp

<https://www.carli.illinois.edu/products-services/i-share/sysreq/secure/SSHSecureShell>

LC Authorities

- During conversion to Voyager, a full set of LC Name and Subject Authority Files was offered to be loaded into your local database
- CARLI loads LC's weekly authority updates for most libraries
- Currently 10,539,806 authority records

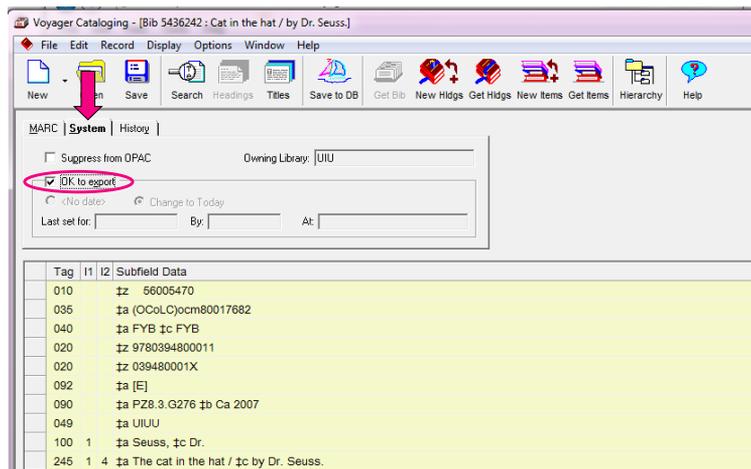
Records CARLI loads into VuFind only

<i>Record Set</i>	<i>VuFind Institution / Location Facet</i>
	HathiTrust eResources (public domain)
EBL eBooks  Ebook Central	CARLI eBooks
	Open Textbook Library

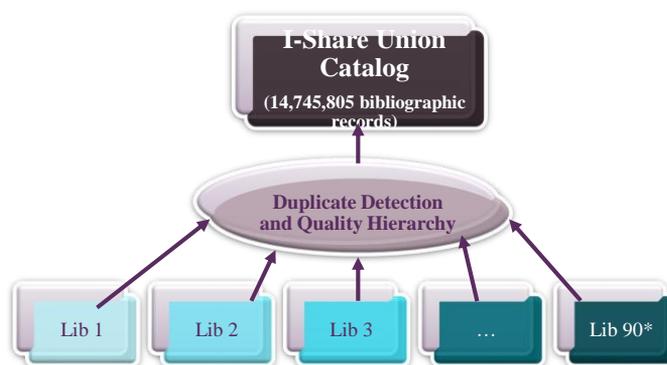
Backloading holdings (aka batch loading in OCLC lingo)

- Sets your library's holdings in WorldCat
- All I-Share libraries are profiled with OCLC for this functionality
- Triggered by selecting "OK to export" in bib record's System tab, or via the bulk import parameter (specified in WRO)
- CARLI scripts later extract applicable bibs from local database and submit to OCLC to add holdings in WorldCat
- Documentation:
<http://www.carli.illinois.edu/products-services/i-share/cat/oclcbackload>

Selecting "OK to export"



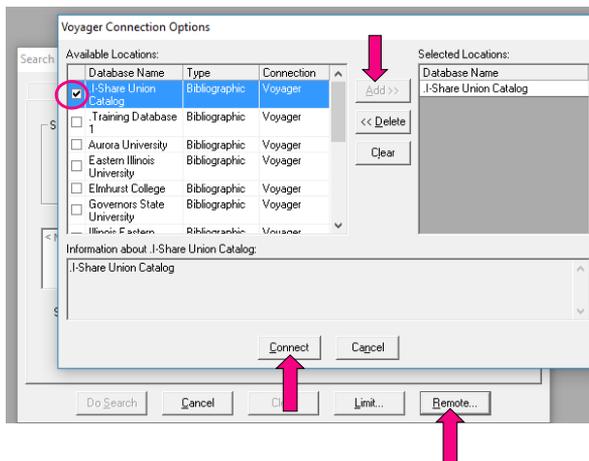
I-Share Catalog (UC)



De-duplicated bibliographic records

I-Share Catalog (UC)

Serves as a source for bibliographic records for copy cataloging
(via Remote Search)



I-Share Catalog (UC)

Current holdings and item status information from each library
displays via the public catalogs: <http://i-share.carli.illinois.edu>

Holdings Description Reviews Excerpt Staff View

University of Illinois at Urbana-Champaign
Location: SSHEL S Collection

Call Number: S 641.5 G866n

Copy 1 Overdue - Due: 12-23-2005

Cite this Text this Email this Export Record Save to List

Western Illinois University
Location: Reserves - Curriculum Library, Horrabin Hall

Call Number: CURRLIB. 641.5 G831na

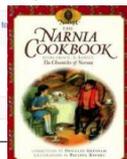
Copy 1 Available Request Item

Cite this Text this Email this Export Record Save to List

Wheaton College
Location: Wade Center -- Reading Room

Call Number: TX652.5 .G74 1998

Copy 1 Available Request Item



New VuFind

More Details Location & Availability Table of Contents User Reviews

Library: Western Illinois University
Location: Reserves - Curriculum Library, Horrabin Hall
Call Number: CURRLIB. 641.5 G831na
Text me this call number

Copy: 1
Status: Available
Request this item

Library: University of Illinois at Urbana-Champaign
Location: SSHEL S Collection
Call Number: S.641.5 G866n
Text me this call number

Copy: 1
Status: c.1 - Overdue, Assumed Lost

Library: Wheaton College
Location: Wade Center -- Reading Room
Call Number: TX652.5 .G74 1998
Text me this call number

Copy: 1
Status: Available
Request this item

VuFind 0.6

I-Share Catalog (UC)

- UC updates (adds/edits) and deletes (suppression/deletion)
- Duplicate detection and quality hierarchy
 1. Is the incoming bib record already found in the UCdb?
 - Primary match points:
 - 035 \$a (OCLC number, other vendor number)
 - combination LCCN + ISBN, or LCCN + ISSN
 - If no match, bib added as new
 2. If YES, which bib is retained as the “master copy”?
 - Quality hierarchy profile based on Encoding level
<http://www.carli.illinois.edu/products-services/i-share/cat/secure/UC-dupdetect>

Suppressing bibs from the UC

- Usually bibs should NOT be suppressed from the UC
- Two ways to omit bibs from the UC:
 1. Suppress from OPAC
 - Function: bib will not display in local OPAC or UC
 - Setting: “Suppress from OPAC” flag
 2. Suppress from UC
 - Function: bibs display in local OPAC, but not in UC
 - Setting: 049 \$u nouc in bib 
 - Policy statement about use of Suppress from UC:
<http://www.carli.illinois.edu/products-services/i-share/acq/uc-suppr-policy>

Deleting UC-specific 035s when importing UC bibs

- During import, delete the Voyager-supplied 035 fields:
 1. *Voyager bib ID of the source bib*
Ex. 035 \$a (EIUdb)1234
 2. *UC bib id*
Ex. 035 \$a 567890
- Do NOT delete the OCLC numbers with (OCoLC) plus prefix ocm, ocn, or on:
Ex. (OCoLC)ocm12345678
- Documentation:
<http://www.carli.illinois.edu/products-services/i-share/cat/oclcnumbrs>

Suppress/replace workflow

- Use for unsuppressed bibs whenever an 035 \$a is:
 - added
 - edited
 - deleted
- Not applicable to already suppressed bibs
(either OPAC suppressed or UC suppressed)
- Not applicable for editing bib fields other than 035 \$a

✓ Complete Exercise 12 along with me

Steps

1. Suppress the bib without making any changes to 035 \$a
2. Waiting period
3. Replace or edit the bib, including the desired change to the 035 \$a.



Waiting period

Extracts begin at X:45 each hour

Tag	I1	I2	Subfield Data
010		ta	57006466
049		tu	nouc

Date/Time	Operator	Cataloging Location
9/6/2000 03:18 PM	demo operator	Cataloging Desk
9/6/2000 03:18 PM	demo operator	Cataloging Desk
1/16/1997		

Tag	I1	I2	Subfield Data
010		ta	57006466

Waiting period (cont.)

If suppressed between X:00-X:44,
wait to replace at (X + 1):00

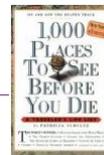
If suppressed between X:45-X:59,
wait to replace at (X+2):00



Safe Cataloging for the UC

- Local notes

- Holdings record 852 \$z public note
 - Displays in New VuFind and VuFind 0.6 local and UC



Elmhurst College	
Location: Main Collections	
Call Number:	910.202 S3870
Notes:	Donated by Patricia and Robert Clark

New VuFind

- Bib record

- 590 \$a local note
 - » Displays in [VuFind 0.6 local](#) (not yet in New VuFind), not in [UC](#)
- 500 \$a local note with \$5 XYZ (*XYZ = MARC Organization code*)
 - » Display in [VuFind local](#) and [UC](#) without the \$5

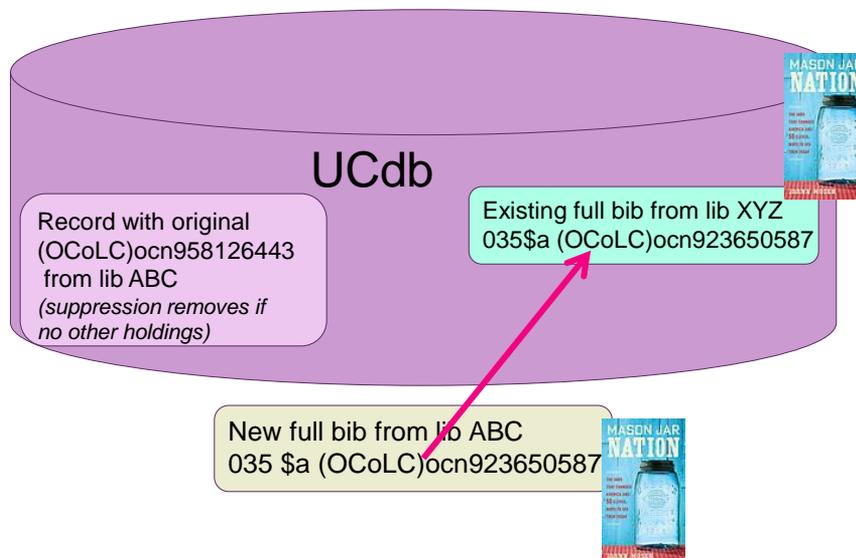
- Local subject headings

- 6xx x4 \$a local subject
- 69x \$a local subject

Safe Cataloging for the UC (cont.)

- Keep subject headings from multiple thesauri
Ex. MeSH headings: 650 _2 Migraine Disorders.
- New cataloging should be as good as you can get it:
 - Turn on MARC validation and authority validation
Options → Preferences → Validation Tab
 - Download I-Share tag tables
<http://www.carli.illinois.edu/products-services/i-share/cat>
 - Review OAI errors
https://www.carli.illinois.edu/products-services/i-share/cat/oai_errors
 - Review other data reports sent by CARLI

Success!



Adding 856 \$u URLs

- The 856 \$u URL must be in the MFHD to display correctly in the UC
- CatER Task Force recommends that each library make its own decision on whether or not to include the 856 \$u URL in the bib record. (R11)

http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cater2009_finalreport.pdf

- Additional CatER mini reports
 - E-monographs: https://www.carli.illinois.edu/sites/files/i-share/documentation/cater_ebooks_mini.pdf
 - E-journals: https://www.carli.illinois.edu/sites/files/i-share/documentation/cater_ejournals_mini.pdf

Requesting a batch load

- Bulk Import
 - Review Data Quality
 - Review Guides and Best Practices
 - Batch Loading Bibliographic Records for Electronic Resources”
<http://www.carli.illinois.edu/sites/files/i-share/documentation/eresbatch.pdf>
 - Batch Loading Mini-Report
https://www.carli.illinois.edu/sites/files/i-share/documentation/cater_batch_mini.pdf
 - Standard Bulk Import Rules in System Administration
<https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cat.pdf>

CARLI batch load customizations

Request customized adds, edits, or deletes when filing a WRO

<http://www.carli.illinois.edu/using-work-requests-online>

Email support@carli.illinois.edu to discuss the possibilities



http://static.tvtropes.org/pmwiki/pub/images/Flame_2401.jpg

Other database maintenance tools and resources

Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance:

<http://www.carli.illinois.edu/products-services/i-share/cat#maint>

Tools to run locally:

- Pick and Scan
- Location Changer
- Catalogers Toolkit, Correction Review, Correction Receiver
- MarcEdit
- Macro Express



Poysel, Emily (2011). 45/365. [Photograph]. Retrieved from Flickr <http://tinyurl.com/or3mux>. CC by 2.0. Some rights reserved.

Questions



support@carli.illinois.edu

*Thank
You*

