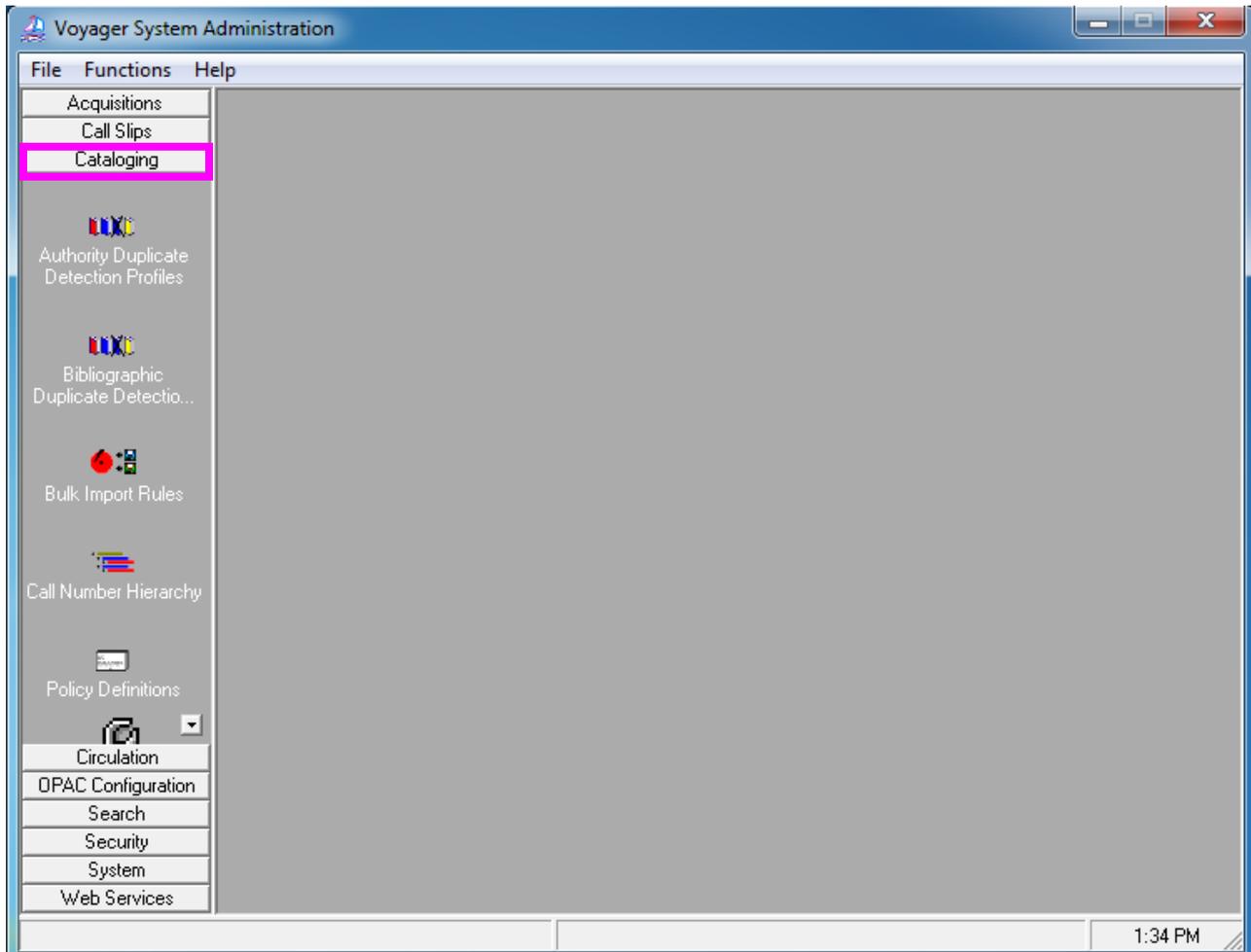


# Voyager System Administration in I-Share Libraries

## PART 6: CATALOGING



*Cataloging System Administration Workspace*

### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

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NOTE: Screen shots that appear throughout this document have been taken from a variety of databases. The settings do not always represent the values your library should use for your policies. I-Share rules and recommendations for settings (when applicable) are found in the explanations of each chapter of the I-Share System Administration documentation.

**Reference Pages:** [System Administration User's Guide 9.1.1](#), pages 4-1 through 4-92

### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

# I. Introduction

This chapter of the I-Share System Administration document is an annotated version of the Cataloging portion of the full Voyager 9.1.1 System Administration User's Guide. Use this chapter to learn the I-Share consortial requirements and recommendations for the settings in the Cataloging portion of the System Administration module. Along with the Ex Libris-produced Voyager SysAdmin manual, this document should be used as a guideline for profiling and configuring your Voyager system in the I-Share environment.

The *Voyager 9.1.1 System Administration User's Guide* contains additional information and explanations and should be consulted when further detail on any topic is needed. This is particularly true of the keystrokes needed to move from one part of SysAdmin to another. That level of detail is intentionally excluded in this document.

The sections in this chapter are arranged in the order that the different parts should be edited when a library is first implementing Voyager as an I-Share member library. Some parts of Cataloging SysAdmin build upon each other, so doing the initial data entry work in the order outlined in this document should make this process more efficient for library staff.

## Checklist:

For your library's initial Cataloging SysAdmin configuration, create the following:

- 1 authority duplicate detection profile: AUTHREP (p. 4)
- 3 bibliographic duplicate detection profiles (p. 9)
  1. OCLCConditional
  2. OCLCCondBulk
  3. OCLCReplace
- 1 or more call number hierarchies (p. 12)
- 1 or more cat policy definitions (p. 15)
  - First, delete the "data review" policy definition after your production bib load
- 8 bulk import rules:
  1. No Holdings Mode for Unicode (p. 23)
  2. No Holdings Replace Mode for Unicode (p. 29)
  3. Express Mode for Unicode (p. 31)
  4. Express Replace Mode for Unicode (p. 42)
  5. Embedded Holdings Mode for Unicode (p. 44)
  6. Embedded Holdings Replace Mode for Unicode (p. 56)
  7. Electronic Resources Mode for Unicode (p. 58)
  8. Electronic Resources Replace Mode for Unicode (p. 70).
- Access to RDA Toolkit (p. 74)

## Legend:

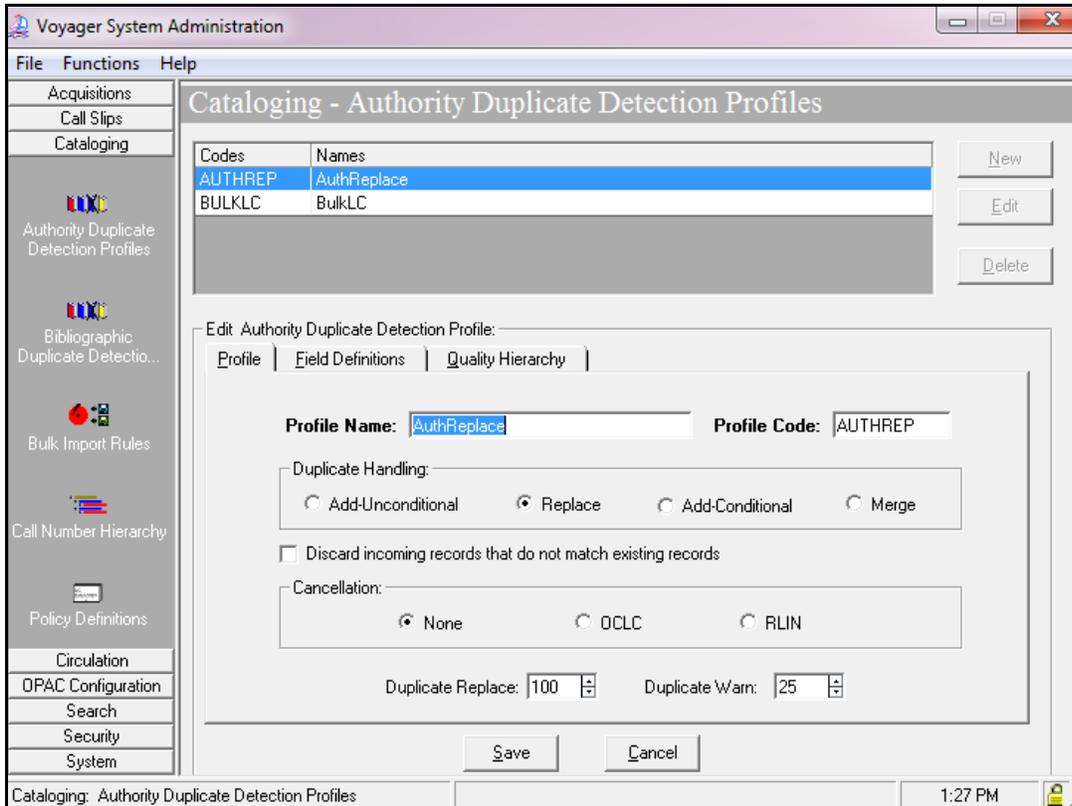
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## II. Authority Duplicate Detection Profiles

This profile defines what identifies an incoming authority record as a duplicate of an existing record and what to do with the duplicate record. This profile is for importing OCLC authority records. If a library loads records from another source, additional profiles may be needed.

⊕ There is one Authority Duplicate Detection Profile that all I-Share libraries should add: **AuthReplace**.

### A. Profile Tab



*Cataloging – Authority Duplicate Detection Profile- Profile Tab*

Enter the following data:

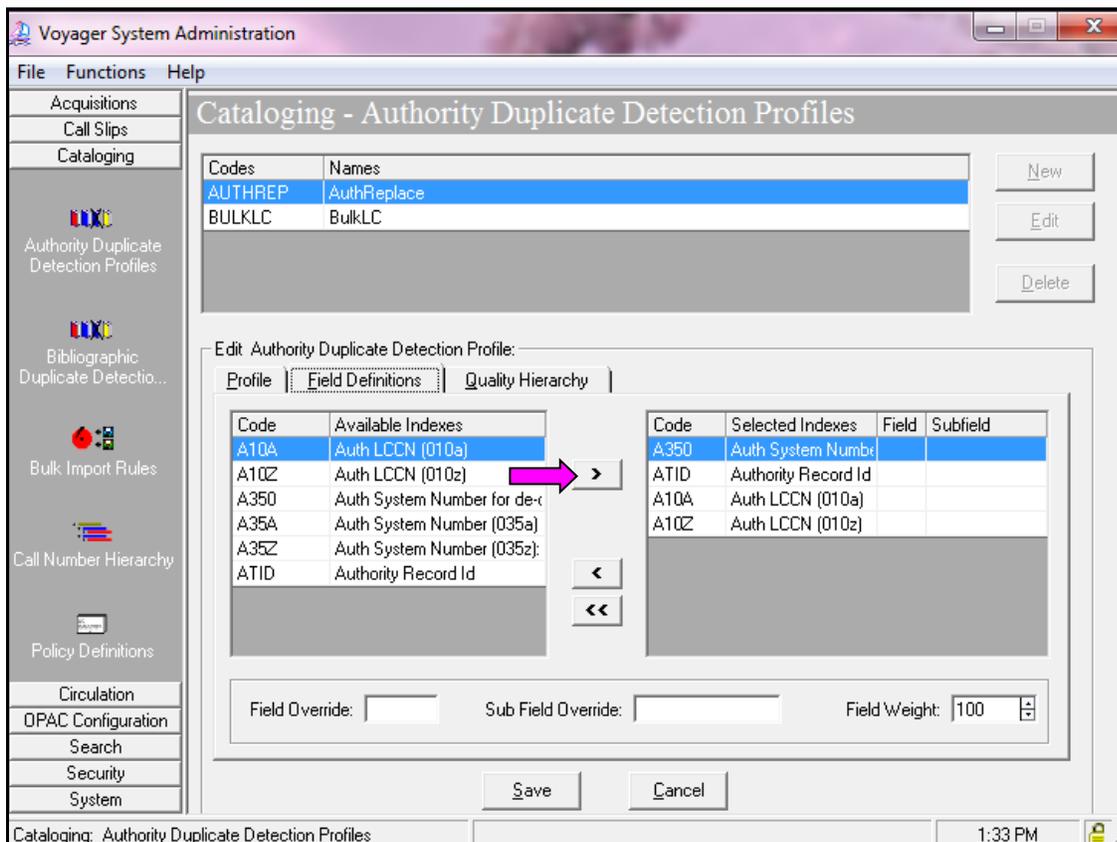
⊕ <b>Profile Name:</b>	<b>AuthReplace</b>
⊕ <b>Profile Code:</b>	<b>AUTHREP (Note: this value is case sensitive)</b>
⊕ <b>Duplicate Handling:</b>	<b>Replace</b>
⊕ <b>Discard incoming records...:</b>	Do not check/enable this option
⊕ <b>Cancellation:</b>	<b>None</b>
⊕ <b>Duplicate Replace:</b>	<b>100</b>
⊕ <b>Duplicate Warn:</b>	<b>25</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

The option to “Discard incoming records that do not match existing records” is new with Voyager version 5 and higher. This option appears in this profile due to the Duplicate Handling value of Replace. The CARLI Office recommends that libraries not enable this option in the AuthReplace authority duplicate detection profile. If this option were to be enabled in this profile, any incoming authority records processed with this profile that did not match existing records in the database would be discarded, instead of added as new records.

## B. Field Definitions Tab



*Cataloging – Authority Duplicate Detection Profile- Field Definitions Tab*

Highlight each of the following fields individually, and then click the right arrow to move the entry to the box on the right.

⊕ <b>A350</b>	<b>Field Weight: 100</b>
⊕ <b>ATID</b>	<b>Field Weight: 100</b>
⊕ <b>A10A</b>	<b>Field Weight: 100</b>
⊕ <b>A10Z</b>	<b>Field Weight: 25</b>

The default field weight is set at 100 as each entry is selected. For the last entry above, be sure to edit the field weight as indicated.

After the entries have been selected, be sure to double check the field weight values for each field, because it is easy to set the wrong field weights in this process.

Legend:

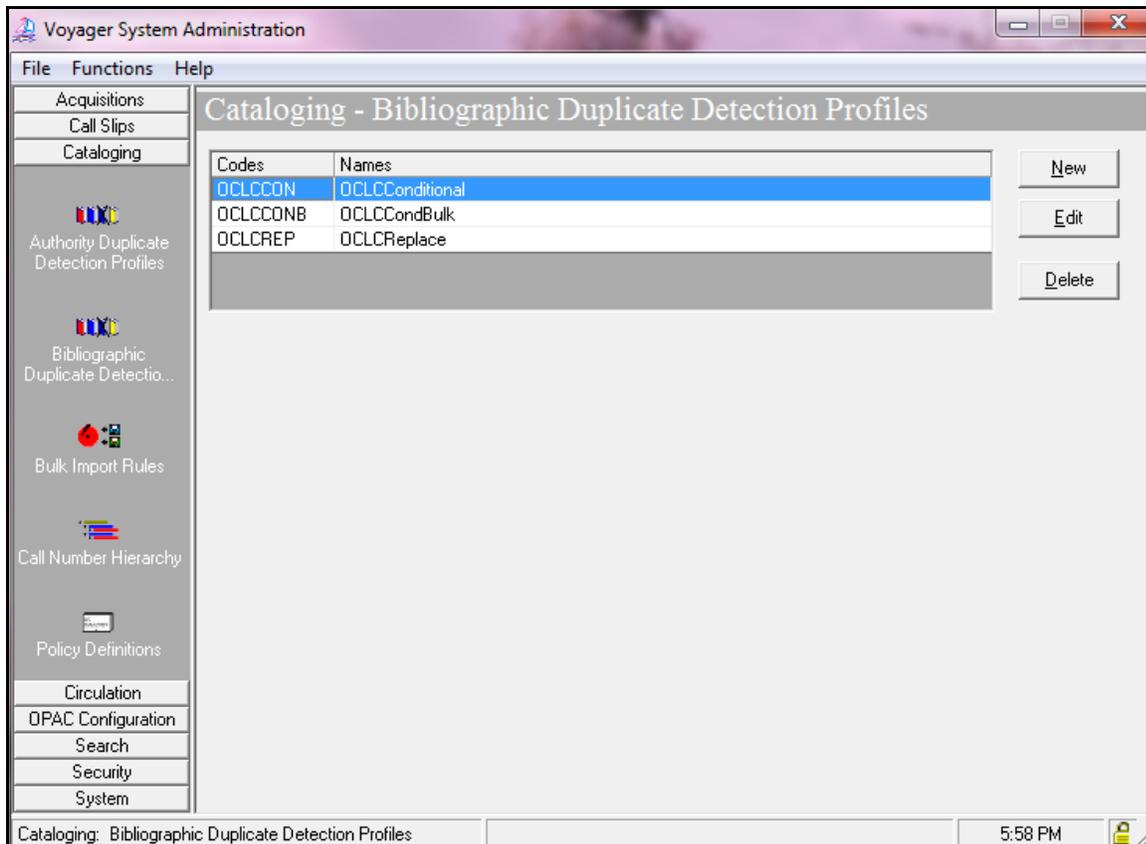
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

### C. Quality Hierarchy Tab

There is no data to be entered on this tab.

## III. Bibliographic Duplicate Detection Profiles

These profiles define what identifies an incoming bibliographic record as a duplicate of an existing record and what to do with the duplicate record. Three I-Share-standard profiles are needed for OCLC record processing. If a library loads records from another source, additional profiles may be needed.



*Cataloging – Bibliographic Duplicate Detection Profile Workspace*

⊕ **There are three Bib Duplicate Detection Policies that all I-Share libraries should add.**

These are described in section III.D, below.

The following two screens are the ones on which to enter the information for each profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## A. Profile Tab

The screenshot shows the Voyager System Administration interface. The main window is titled "Cataloging - Bibliographic Duplicate Detection Profiles". It contains a table with the following data:

Codes	Names
OCLCCON	OCLCConditional
OCLCCONB	OCLCCondBulk
OCLCREP	OCLCReplace

Below the table is an "Edit Bibliographic Duplicate Detection Profile" dialog box. The "Profile Name" is "OCLCConditional" and the "Profile Code" is "OCLCCON". The "Duplicate Handling" section has radio buttons for "Add-Unconditional", "Replace", "Add-Conditional" (selected), "Merge", and "Bi-Directional Merge". There is a checkbox for "Discard incoming records that do not match existing records" which is unchecked. The "Cancellation" section has radio buttons for "None", "OCLC" (selected), and "RLIN". At the bottom, there are spinners for "Duplicate Replace" (set to 100) and "Duplicate Warn" (set to 10). "Save" and "Cancel" buttons are at the bottom of the dialog.

*Cataloging – Bibliographic Duplicate Detection Profile – Profile Tab*

### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## B. Field Definitions Tab

The screenshot shows the 'Voyager System Administration' interface. The main window is titled 'Cataloging - Bibliographic Duplicate Detection Profiles'. On the left is a navigation pane with options like 'Acquisitions', 'Call Slips', 'Cataloging', 'Authority Duplicate Detection Profiles', 'Bibliographic Duplicate Detection...', 'Bulk Import Rules', 'Call Number Hierarchy', 'Policy Definitions', 'Circulation', 'OPAC Configuration', 'Search', 'Security', and 'System'. The main area has a 'Codes' table with columns 'Codes' and 'Names':

Codes	Names
OCLCCON	OCLCConditional
OCLCCONB	OCLCCondBulk
OCLCREP	OCLCReplace

Below this is the 'Edit Bibliographic Duplicate Detection Profile:' section with two tabs: 'Profile' and 'Field Definitions'. The 'Field Definitions' tab contains two tables:

Code	Available Indexes	Code	Selected Indexes	Field	Subfield
035A	System Number (035a)	035A	System Number (035a)	019	a
035Z	System Number (035z): Cancelled/Invalid	010A	LCCN (010a)		
074A	GPO Item Number (074a)	022A	ISSN (022a)		
074Z	GPO Item Number (074z): Cancelled/Invalid	024I	ISBN-13 (024a)		
100H	Personal Name	028A	Publisher Number (028a)		
110H	Corporate Name	0350	System Number for de-duping (035a)		
111H	Conference				

Below the tables are input fields: 'Field Override' (019), 'Sub Field Override' (a), and 'Field Weight' (100). 'Save' and 'Cancel' buttons are at the bottom.

### *Cataloging – Bibliographic Duplicate Detection Profile – Field Definitions Tab*

For each profile described in section III.D below, highlight each of the fields listed individually, and then click the right arrow to move the entry to the box on the right. Be sure to edit the field weights as indicated; the default field weight is 100, but many fields require a different value.

After the entries have been selected, be sure to double check the field weight values for each field, because it is easy to set the wrong field weights in this process, which could produce undesirable or unexpected results during manual or bulk imports of bibliographic records.

## C. Quality Hierarchy Tab (OCLCReplace Profile only)

Note: There are no entries to be made on the Quality Hierarchy tab.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## ⊕ Three Bibliographic Duplicate Detection Profiles to Add

### Profile #1 – OCLC Conditional

#### A. Profile Tab

Enter the following data:

⊕ <b>Profile Name:</b>	<b>OCLCConditional</b>
⊕ <b>Profile Code:</b>	<b>OCLCCON (Note: this value is case sensitive)</b>
⊕ <b>Duplicate Handling:</b>	<b>select Add-Conditional</b>
⊕ <b>Cancellation:</b>	<b>select OCLC</b>
⊕ <b>Duplicate Replace:</b>	<b>100</b>
⊕ <b>Duplicate Warn:</b>	<b>10</b>

The option to “Discard incoming records that do not match existing records” remains grayed out in this profile, because that option only applies to profiles whose Duplicate Handling setting is Replace or Merge.

#### B. Field Definitions Tab

Enter the following data:

⊕ <b>010A</b>	<b>Field Weight: 10</b>
⊕ <b>022A</b>	<b>Field Weight: 10</b>
⊕ <b>024I</b>	<b>Field Weight: 10</b>
⊕ <b>028A</b>	<b>Field Weight: 10</b>
⊕ <b>0350</b>	<b>Field Weight: 100</b>
⊕ <b>035A</b>	<b>Field Weight: 100, field override = 019, subfield override = a</b>
⊕ <b>BBID</b>	<b>Field Weight: 100</b>
⊕ <b>ISB3</b>	<b>Field Weight: 10</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## Profile #2 – OCLC Replace

### A. Profile Tab

Enter the following data:

⊕ <b>Profile Name:</b>	<b>OCLCReplace</b>
⊕ <b>Profile code:</b>	<b>OCLCREP (Note: this value is case sensitive)</b>
⊕ <b>Duplicate Handling:</b>	<b>select Replace</b>
⊕ <b>Cancellations:</b>	<b>select None</b>
⊕ <b>Duplicate Replace:</b>	<b>100</b>
⊕ <b>Duplicate Warn:</b>	<b>75</b>

The option to “Discard incoming records that do not match existing records” appears in this profile due to the Duplicate Handling value of Replace. CARLI recommends that for OCLC Replace, this option remain unselected.

If the Discard incoming records... option is enabled, any incoming bibliographic records that do not match an existing record in the database are not added as new records, but instead are discarded. If the Discard... option is not enabled, any incoming bib records that do not match an existing record in the database are added as new records. The Ex Libris default is that this option is not enabled.

CARLI believes that this option might be useful to libraries that use bulk import for special projects, such as projects that involve extracting bib records from the Voyager database and then re-loading the bibs after some time has past. A new bibliographic duplicate detection profile should be created when using this feature. While not required, a naming convention that could be used for this new profile is code REPNOADD with a profile name of ReplaceNoAdd. This naming convention would distinguish the new profile from the existing OCLCReplace profile.

If the library does create a new bibliographic duplicate detection profile for this Replace No Add processing option, the bulk import rule that uses this dup detection profile must also point to the REPNOADD profile. See section V for more information about setting the duplicate detection profile in a bulk import rule.

### B. Field Definitions Tab

Enter the following data:

⊕ <b>010A</b>	<b>Field Weight: 10</b>
⊕ <b>022A</b>	<b>Field Weight: 10</b>
⊕ <b>024I</b>	<b>Field Weight: 10</b>
⊕ <b>028A</b>	<b>Field Weight: 10</b>
⊕ <b>0350</b>	<b>Field Weight: 100</b>
⊕ <b>035A</b>	<b>Field Weight: 100, field override = 019, subfield override = a</b>
⊕ <b>BBID</b>	<b>Field Weight: 100</b>
⊕ <b>ISB3</b>	<b>Field Weight: 10</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## Profile #3 – OCLC Conditional Bulk

### A. Profile Tab

Enter the following data:

⊕ <b>Profile Name:</b>	<b>OCLCCondBulk</b>
⊕ <b>Profile Code:</b>	<b>OCLCCONB (Note: this value is case sensitive)</b>
⊕ <b>Duplicate Handling:</b>	<b>select Add-Conditional</b>
⊕ <b>Cancellation:</b>	<b>select OCLC</b>
⊕ <b>Duplicate Replace:</b>	<b>100</b>
⊕ <b>Duplicate Warn:</b>	<b>30</b>

The option to “Discard incoming records that do not match existing records” remains grayed out in this profile, because that option only applies to profiles whose Duplicate Handling setting is Replace or Merge.

### B. Field Definitions Tab

Enter the following data:

⊕ <b>010A</b>	<b>Field Weight: 20</b>
⊕ <b>022A</b>	<b>Field Weight: 15</b>
⊕ <b>024I</b>	<b>Field Weight: 10</b>
⊕ <b>028A</b>	<b>Field Weight: 10</b>
⊕ <b>0350</b>	<b>Field Weight: 100</b>
⊕ <b>035A</b>	<b>Field Weight: 100, field override = 019, subfield override = a</b>
⊕ <b>BBID</b>	<b>Field Weight: 100</b>
⊕ <b>ISB3</b>	<b>Field Weight: 25</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

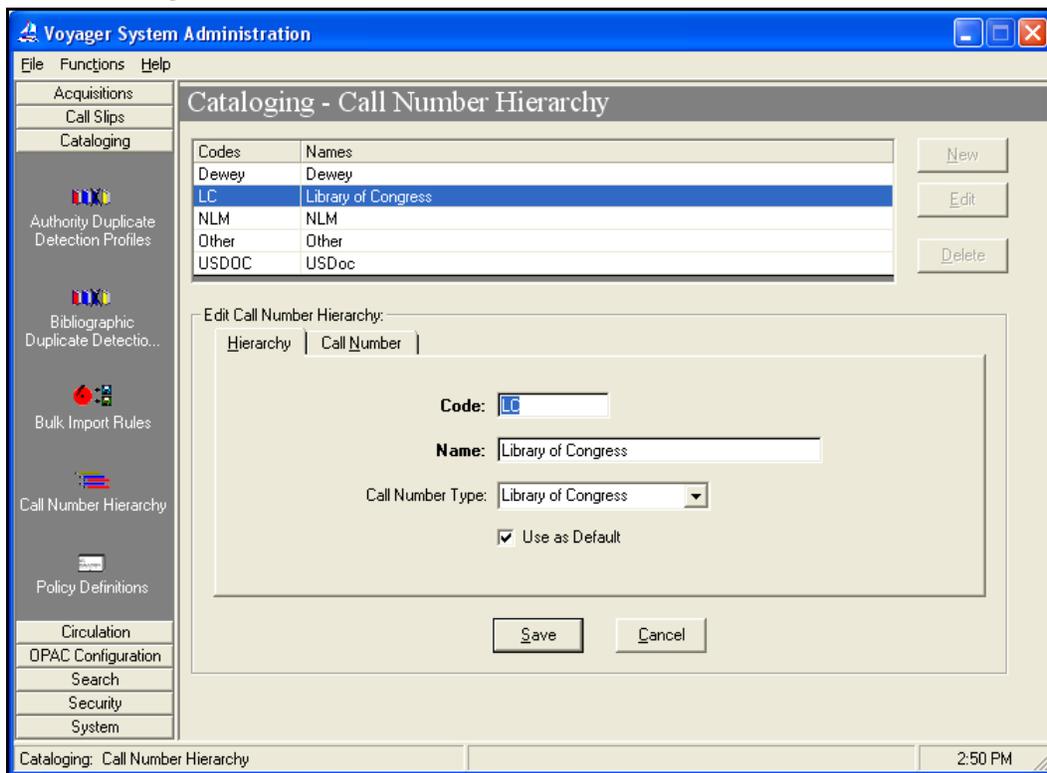
## IV. Call Number Hierarchy

Libraries will need to set up any call number hierarchies needed. New Voyager databases do not contain any defaults for this SysAdmin section.

The Call Number Hierarchy is invoked when a new MFHD is added to the database via either a bulk import or an online transaction. Voyager will copy a call number found in the bib record into the new MFHD based on the Call Number Hierarchy selected, and the values entered into the Call Number Hierarchy.

For example, a Library of Congress Call Number Hierarchy might have the 050 field listed first, followed by the 090 field. When an incoming bib record contains both of these fields, the 050 field would be copied into the MFHD for this library, since they entered the 050 field at the top of the hierarchy. Using this same example, an incoming bib that contained an 090 field but no 050 field would have the 090 field copied into the MFHD, because the 090 field was second on the hierarchy.

### A. Hierarchy Tab



*Cataloging – Call Number Hierarchy – Hierarchy Tab*

#### Steps:

1. Enter a Hierarchy Code and Name. Use any Code and Name that makes sense to the local library.
2. Select the Call Number type.
3. Click Use as Default if this hierarchy represents the primary call number classification type used by the library.

#### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

The Call Number Type value entered here sets the 852 first indicator value in newly added MFHDs, as follows:

<b>Call Number Type</b>	<b>852 first indicator</b>
Library of Congress	0
Dewey Decimal	1
NLM Classification	2
Government Documents	3
Other	8

Because of the 852 first indicator values that are set based on the entries in the hierarchy, libraries should create a separate call number hierarchy for each Call Number Type that the library uses in its cataloging.

For example, if the library is a government documents repository and uses SuDOC classification, a separate SuDOC hierarchy should be created. However, if the library classifies all Federal documents using LC or Dewey (only, not SuDOC), then the library would not need to create a separate SuDOC hierarchy.

Different call number hierarchies can be linked to individual entries in a bulk import rule's mapping table, so that the appropriate hierarchy is invoked as needed when bib records are loaded via batch (e.g., bulk import). See the Express Mode bulk import rule section below for an example.

## B. Call Number Tab

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

*Cataloging – Call Number Hierarchy – Call Number Tab*

1. Enter the bib record fields and subfields from which call numbers will be drawn for this classification system in the order of preference.
  - a. All iterations of subfields you want copied into your MFHDs must be defined.
  - b. For example, the hierarchy in the previous screenshot in IV B. will copy into a MFHD an LC call number (field 050) with subfields a and b in preference to one with only subfield a.
  - c. Omitting the fourth line would prevent an 090 field without subfield b from ever being used when the call number is copied from the bib into the MFHD.
2. Add a call number hierarchy for each classification scheme used in your library.
3. You may need to define an "Other" hierarchy, if the library uses any "local" call number schemes.
  - a. It is recommended that the library create an "Other" hierarchy (if applicable) rather than adding the 099 field to a standard call number hierarchy, in order to set the MFHD 852 first indicator properly.
  - b. In a library's "Other" call number hierarchy, field 099 (the appropriate bib record field for local call number data entry) can have two subfield a's.

This would be coded:

*Cataloging – Call Number Hierarchy Settings Workspace*

Many libraries create their "Other" call number hierarchy with two rows, as in the example below. This means that an 099 field with two subfield a's will take precedence over an 099 with a single subfield a.

Ind1	Ind2	Field	SubFld	Cutter-SubFld
*	*	099	a	a
*	*	099	a	a

*Cataloging – Call Number Hierarchy – Call Number Tab with two "Other" call number hierarchies entered*

**Legend:**

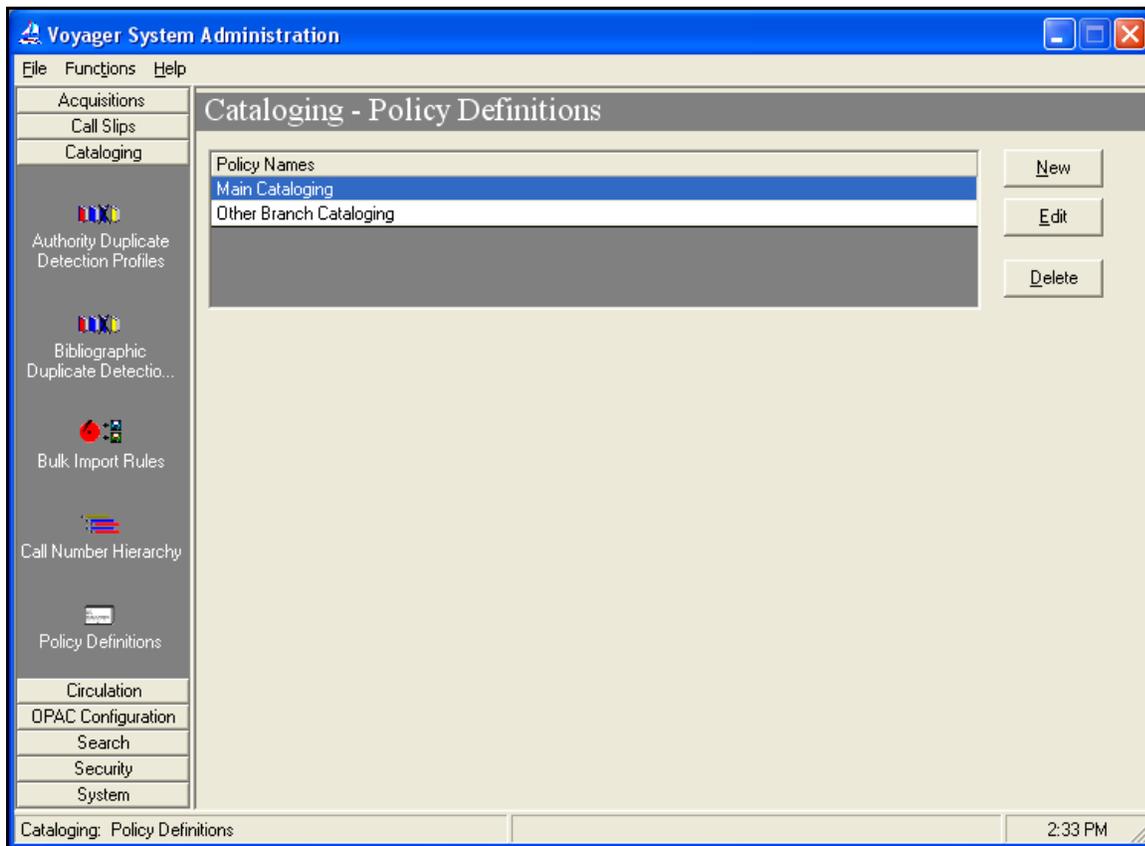
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## V. Cataloging Policy Definitions

This function places into policy definition(s)/group(s) the locations for which a single cataloging department will have authority to perform work. If a library has only one cataloging department, then all locations should be assigned to a single cataloging policy definition. If there are separate cataloging departments for a main library and a branch, then two cataloging policy definitions may need to be established, with all the main library locations assigned to the main cataloging policy definition and all the branch locations assigned to the branch cataloging policy definition. An individual location may be assigned to only one policy definition.

When your Voyager database was created as part of the migration process, a default Cataloging Policy Definition called "data review" was established, to enable the library to perform their bib load data review.

⊕ **CARLI strongly recommends that this default policy definition be deleted before the library creates their "real" cataloging policy definitions following the production bib load.**

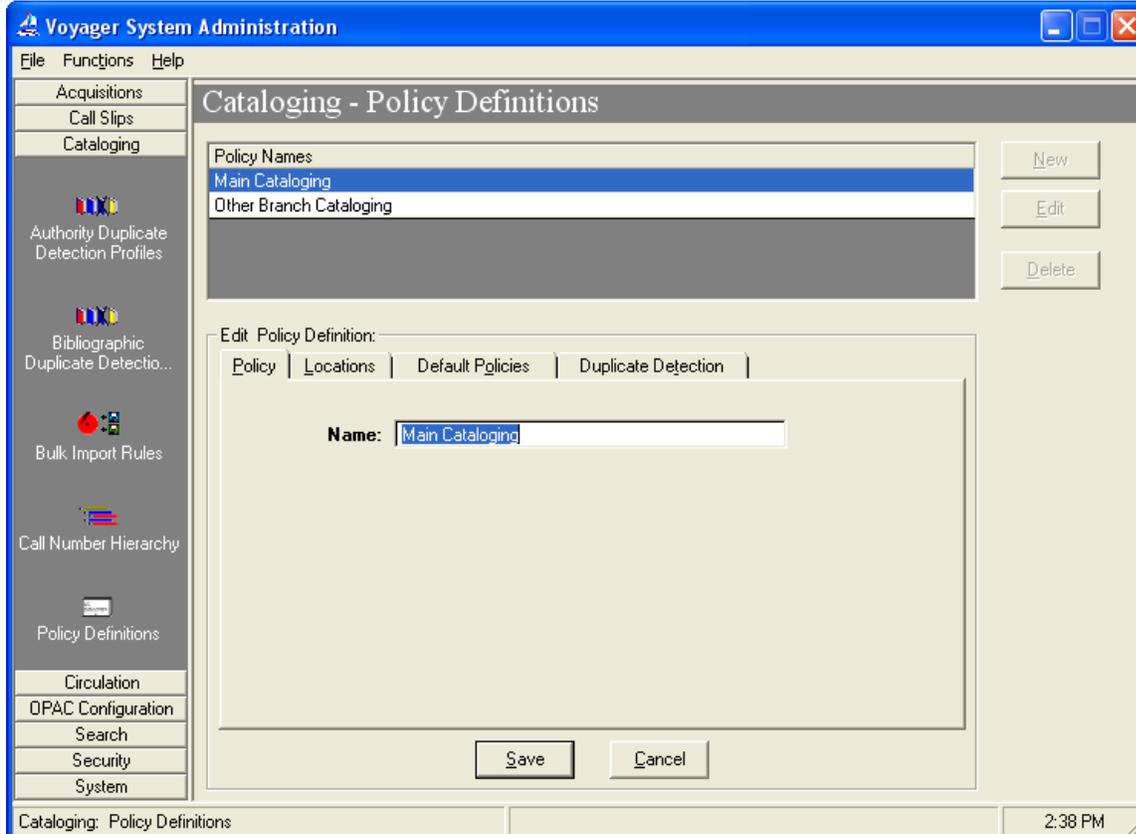


*Cataloging – Policy Definitions Workspace*

### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## A. Policy Name Tab



*Cataloging- Policy Definitions –Policy Tab*

Libraries can name their Cataloging Policy Definition(s) anything that makes sense to the local library. If the library creates more than one policy definition, the Names created on this screen display to cataloging staff when they log on to the Cataloging client. Staff then choose the appropriate policy for their workflow.

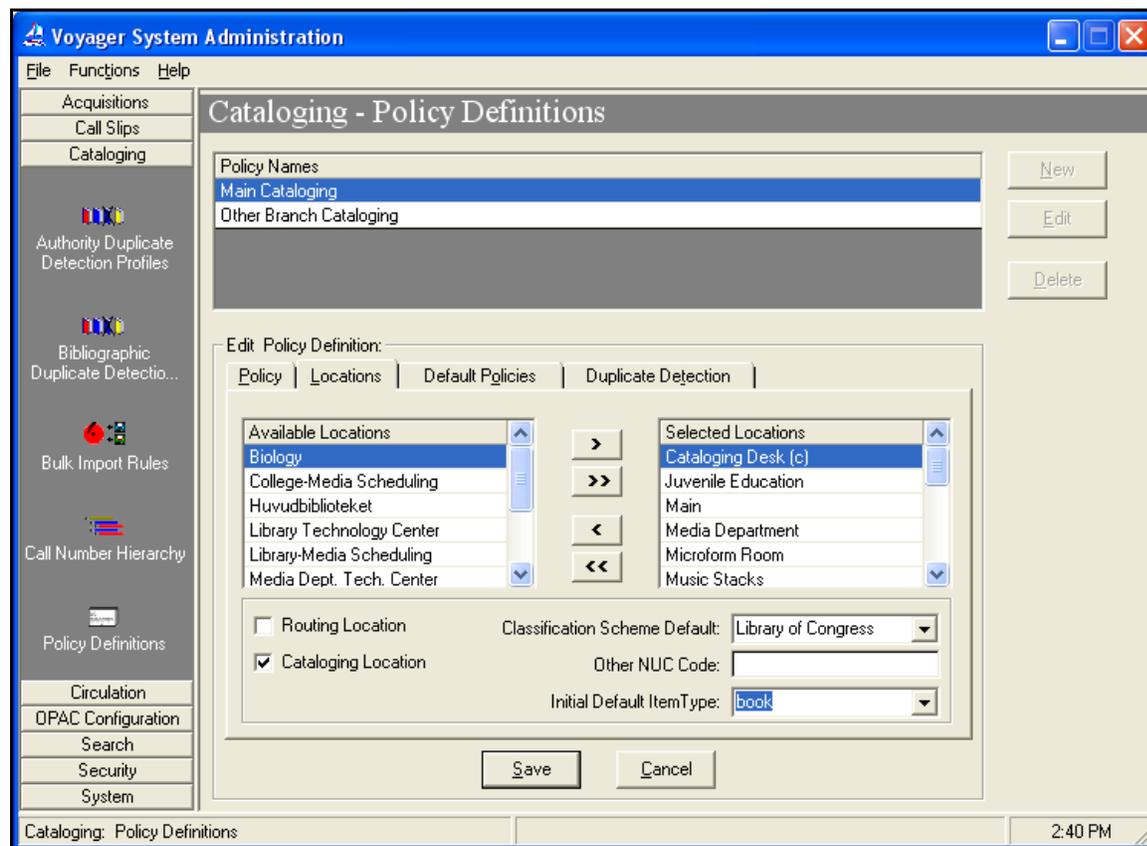
Enter the following data:

<input checked="" type="checkbox"/> <b>Name:</b>	Make the name meaningful to your library. Can be up to 40 characters.
--	---

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## B. Locations Tab



*Cataloging- Policy Definitions –Locations Tab*

The locations that display in the Available Locations box are locations that have been set up in the System Administration>System configuration and Security settings. These locations may have been added as a part of your conversion to Voyager.

- When adding a new location to Voyager, follow the steps outlined in the webpage “Adding a Location in Voyager SysAdmin”: <http://www.carli.illinois.edu/products-services/i-share/sysadmin/secure/addlocations>

### ***A location can belong to only one Cataloging Policy Group (Policy Definition).***

- From the list of Available Locations in the box on the left, select the desired locations for the definition so that they appear in the Selected Locations box on the right.
- If a library creates only a single policy definition, use the >> button to select all locations into the policy definition.

Enter the following data:

<p><b>Available Box:</b></p>	<p>This list contains all locations that are not already part of any other Cataloging Policy Group, but are part of the operator’s Master Security Profile.  <b>Move all appropriate locations for the policy group to the Selected locations using the</b></p>
------------------------------	---

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

	<b>arrow buttons.</b>
<b>Selected Box:</b>	This list contains locations that belong to the currently defined Cataloging Policy Group.

Once these locations are in the Selected Location area, the locations will need further customization.

Highlight each location from the **Selected Locations** box individually and additional boxes will appear below.

Note, a Cataloging HAPPENING location must be chosen for each Cataloging policy definition. The Cataloging HAPPENING location is a location where cataloging is performed.

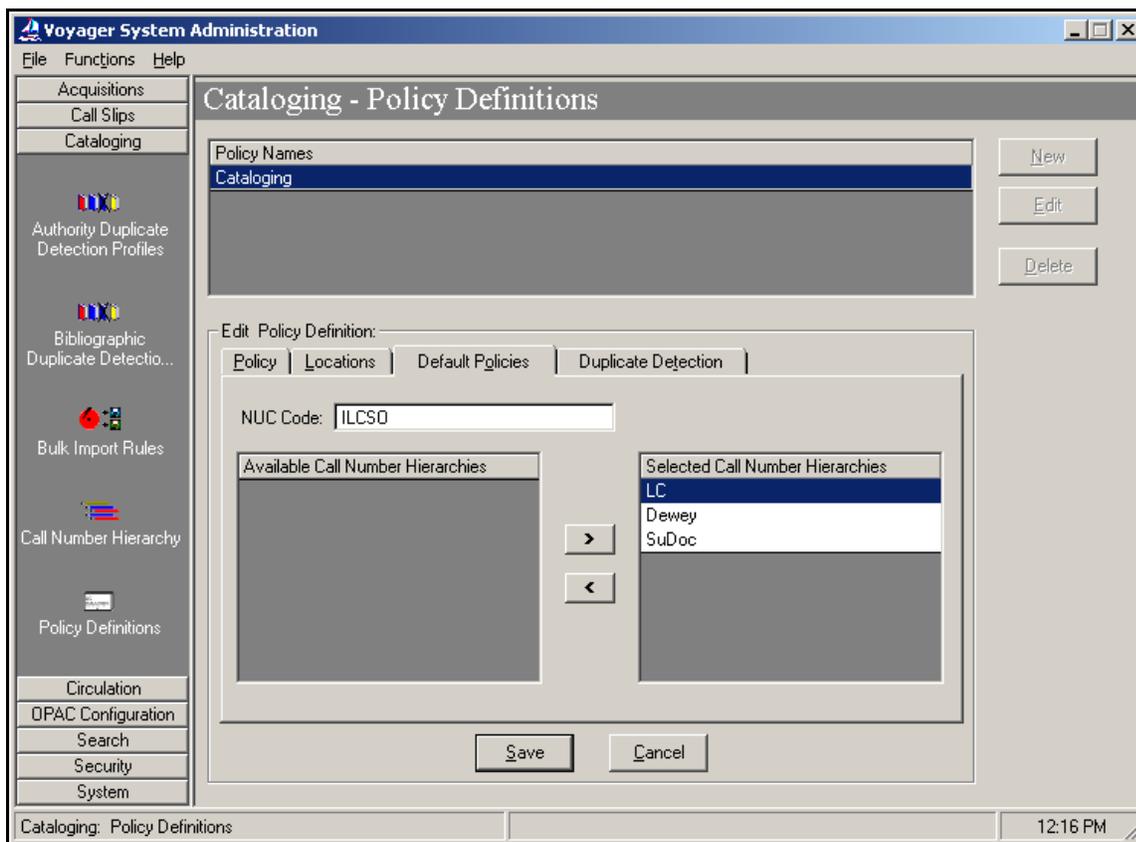
Enter the following data:

<b>⊕ Classification Scheme Default:</b>	<b>Choose the appropriate value for the location.</b>  Voyager will use the values selected here when the individual staff member does not override these defaults with values in their client preference settings.
<b>⊕ Initial Default Item Type:</b>	<b>Choose the appropriate value for the location.</b>  Voyager will use the values selected here when the individual staff member does not override these defaults with values in their client preference settings.
<b>∅ Other NUC Code:</b>	<b>Leave the field blank;</b> there is no functionality based on this value.
<b>⊕ Cataloging Location:</b>	Check this box if the location is a HAPPENING Location where cataloging is performed. • If this box is checked, a "(c)" appears next to this location in the Selected Locations list.  <b>You must have at least one location defined as a cataloging HAPPENING Location for each cataloging policy group.</b>
<b><input checked="" type="checkbox"/> Routing Location:</b>	If you want the location to be a routing location, <b>check the Routing Location box.</b>  A checked Routing Location box will prompt a circulation operator to create a routing slip; this could be used for items that need to be specially routed for re-shelving purposes.

Legend:

- ⊕ Consortial Rule for setting value(s)
- CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

### C. Default Policies Tab



*Cataloging - Policy Definitions –Default Policies Tab*

Click the Default Policies tab to select policies for the definition.

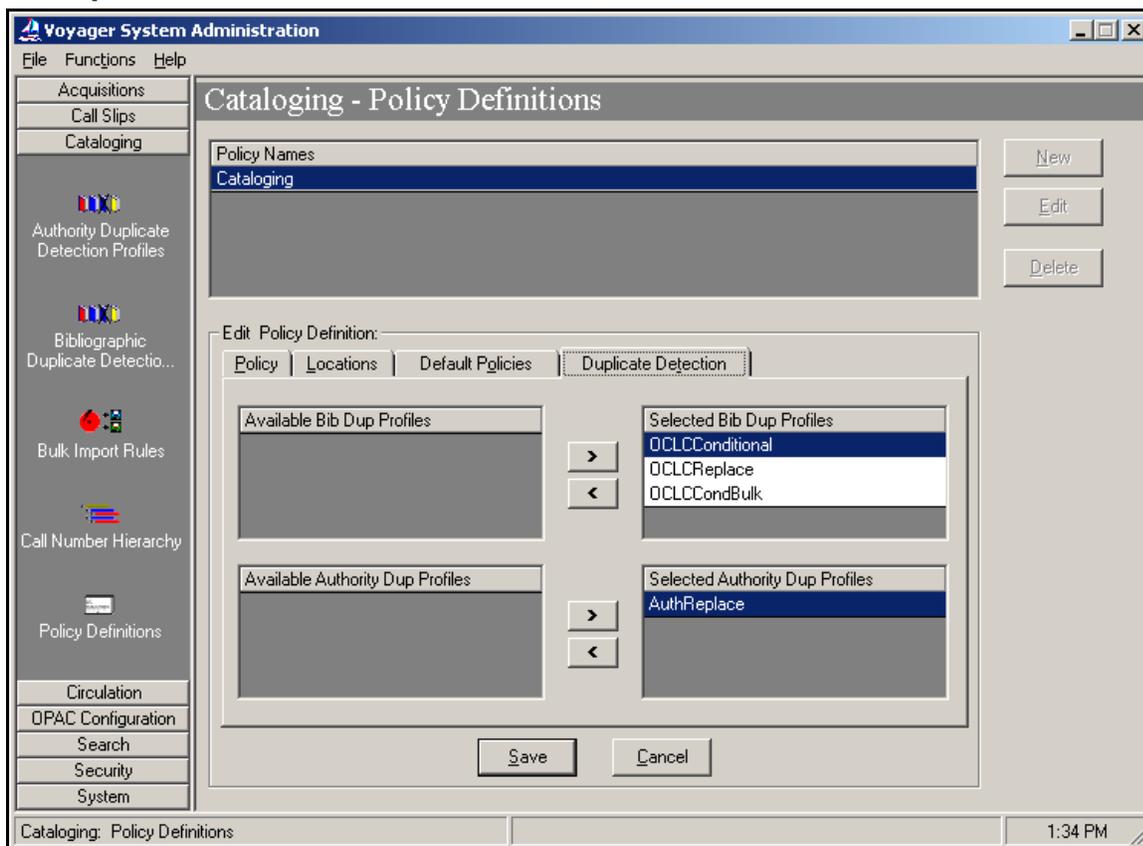
Enter the following data:

<p>⊕ <b>NUC Code:</b></p>	<p><b>Fill in the box with the library's OCLC three-character institution code.</b></p>
<p>⊕ <b>Call Number Hierarchies:</b></p>	<p><b>Select all available Call Number Hierarchies from the Available list on the left and move them to the Selected list on the right.</b></p> <p>Selecting the hierarchies makes them available for use within the Cataloging client, for staff logged on to this policy definition.</p>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## D. Duplicate Detection Tab



*Cataloging- Policy Definitions –Duplicate Detection Tab*

Click the Duplicate Detection tab to select profiles for the policy definition.

Enter the following data:

<p>⊕ <b><i>Bib Dup Profiles:</i></b></p>	<p><b>Select all available Bib Dup Profile from the Available list on the left and move them to the Selected list on the right.</b></p> <p>Selecting the profiles make them available for use within the Cataloging client, for staff logged on to this policy definition.</p>
<p>⊕ <b><i>Authority Dup Profiles:</i></b></p>	<p><b>Select all available Authority Dup Profile from the Available list on the left and move them to the Selected list on the right.</b></p> <p>Selecting the profiles make them available for use within the Cataloging client, for staff logged on to this policy definition.</p>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## VI. Bulk Import Rules

Documented here are the I-Share required bulk import rules to support the batch loading of bibliographic records. These rules are used in conjunction with the data entry specifications detailed in the *Using OCLC for Batch Loading Records into I-Share Databases* document

[http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/using\\_OCLC.pdf](http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/using_OCLC.pdf).

Note that these rules do not apply to OCLC export transactions.

Bib records obtained from other vendors (e.g., Marcive) may also use these bulk import rules if they meet the library's needs. Libraries can also create additional bulk import rules as needed for non-OCLC vendors.

### Optional settings in bulk import rules

In the bulk import rule descriptions that follow, there are several options available in each rule that are set at the discretion of the library, based on local workflow. These options are described here, to reduce repetitiveness throughout the remainder of this section. Some options only apply to bulk import rules of a certain type. For example the "Leave OPAC Suppress Unchanged..." option only works with bulk import rules that use a "Replace"-type duplicate detection profile. Each rule description below will include a reference to this section for more details on the optional settings that apply to that particular rule.

#### A. "Leave OPAC Suppress Unchanged for Replaced and Merged Records" Option

For any bulk import rule that uses a "Replace" bib duplicate detection profile, with Voyager version 5 and higher, there is a new option to "Leave OPAC Suppress Unchanged for Replaced and Merged Records." If this option is checked/enabled, when the existing bib is replaced by bulk import, the bib's Suppress from OPAC flag (on the System tab of the bib record) is not reset by bulk import. In other words, if the existing bib has the Suppress from OPAC flag set to Yes and the bulk import rule's Leave OPAC Suppress Unchanged... option is enabled, the OPAC suppression is not removed when the bib is replaced using this bulk import rule. If the Leave OPAC Suppress option is not enabled, then the OPAC suppression in the existing bib is removed when the bib is replaced.

The decision about use of the Leave OPAC Suppress Unchanged... option is at the discretion of the local library, based on their workflows regarding the use of their "Replace" type bulk import rules. Most I-Share libraries do not enable this option, however.

#### B. "Create PO/MFHD/Item for existing Bibs" option

It is the local library's decision about whether to check (enable) the **Create PO/MFHD/Item for existing Bibs** option.

It is possible for bulk import to add new MFHDs, items, and PO line items to existing bib records in the local database. In other words, when the duplicate detection profile identifies an incoming bib as matching an existing bib, the option exists to have bulk import create a new MFHD, item, and PO line item and link them to the existing bib record.

This feature is active for replace, add-conditional, or merge bibliographic duplicate detection profiles.

Note: This option enables MFHDs, Items, and PO line items to be added even when the bibliographic record does not win the equality hierarchy and is discarded. MFHDs, items, and PO line items are not added if the maximum number of duplicate records is detected.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

The CARLI Office recommends that whenever an individual cataloging situation calls for replacing an existing bib record with an incoming record, but not to create any new holdings, items, or PO line items, that the library perform the transaction in No Holdings Replace for Unicode mode. This will prevent any unintentional MFHDs, items, or PO line items from being created by bulk import.

## **SPECIAL NOTE on “Expected Character Set” values in bulk import rules:**

With the Voyager with Unicode version and higher, the values selected in the “Expected Character Set Mapping of Imported Records” field must be appropriate for the source of the incoming records. The value found in the bibliographic records’ Leader byte 9 is the key factor for this setting.

Incoming records that contain a value of “a” (representing Unicode-enabled bibs) in Leader byte 9 can only be loaded during bulk import if the Expected Character Set value in the bulk import rule is set to a Unicode value. If there is a mismatch in these settings, and the first record in the incoming file does not have the expected value in Leader byte 9, the load is aborted and no records are processed.

OCLC’s WorldShare Metadata Collection Manager platform allows batch output of records in “MARC21 with UTF-8 Unicode” format which is the ideal character set to import the greatest number of characters.

The details in this section of this document show both a Unicode and a non-Unicode version of each bulk import “mode.” Unless libraries need a non-Unicode version of a bulk import rule to load bib records from a non-OCLC vendor, libraries can but are not required to create the non-Unicode bulk import rules described below until instructed to do so by the CARLI Office.

## **Verify other data entry and begin entering Bulk Import Rules.**

Before editing this section, verify the other sections of Cataloging SysAdmin setup:

1. Verify your Bib Duplicate Detection Profiles
2. Make sure you have entries for OCLCCondBulk and OCLCReplace already in place using the settings documented above.
3. Verify your Call Number Hierarchy
4. Make sure you have an entry for any call number hierarchies used by your library already in place, using the settings documented above.

**NOTE: The data to be entered in this section is case sensitive; follow the instructions exactly.**

Legend:

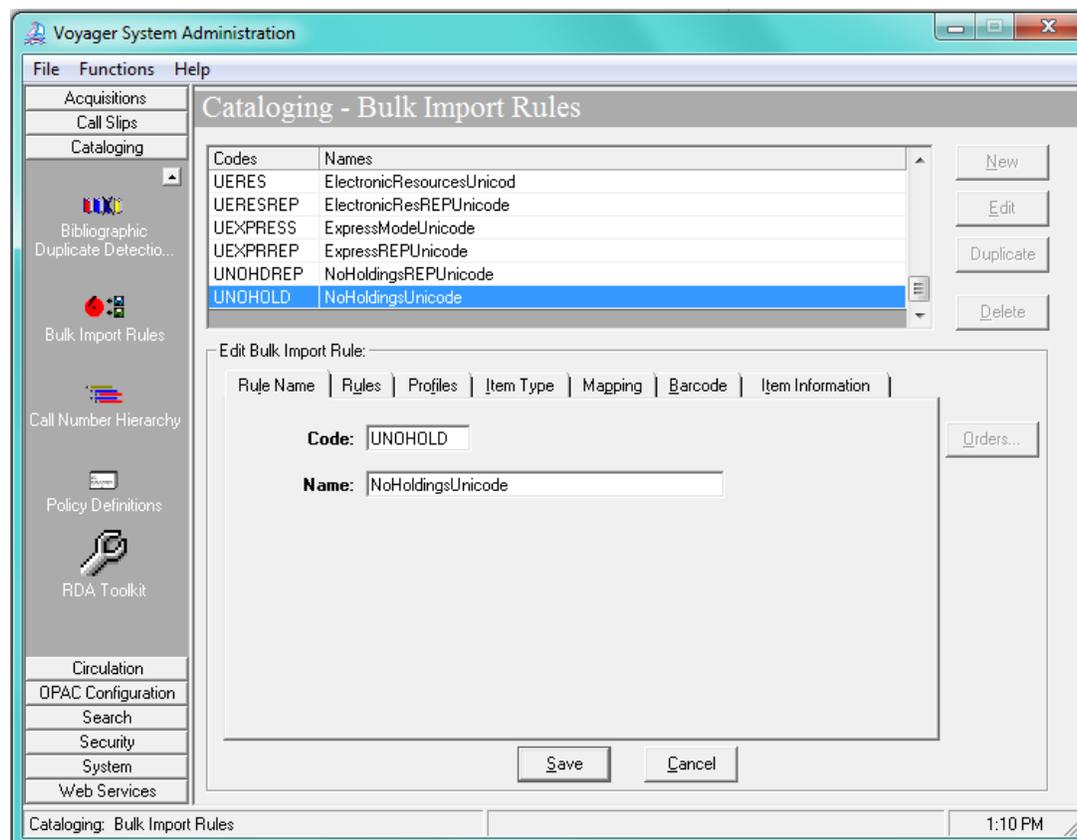
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## No Holdings Mode for Unicode

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

For the No Holdings Mode for Unicode rule, you will only need to define the Rule Code, Rule Name, and the various entries on the Rules and Profiles tab. The Item Type, Mapping, Barcode, and Item Information tabs are not populated in this rule.

### A. Rule Name Tab



*Cataloging- Bulk Import Rules – Rule Name Tab*

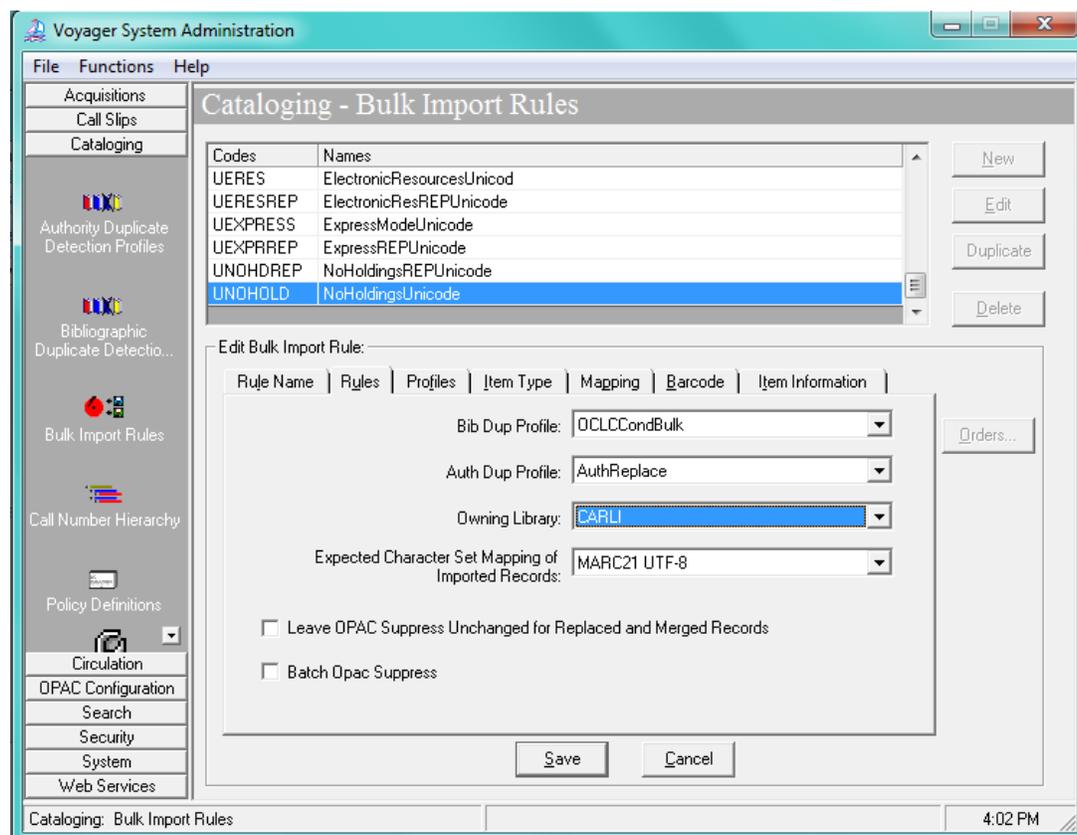
Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>UNOHOLD</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>NoHoldingsUnicode</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## B. Rules Tab



*Cataloging- Bulk Import Rules – Rules Tab*

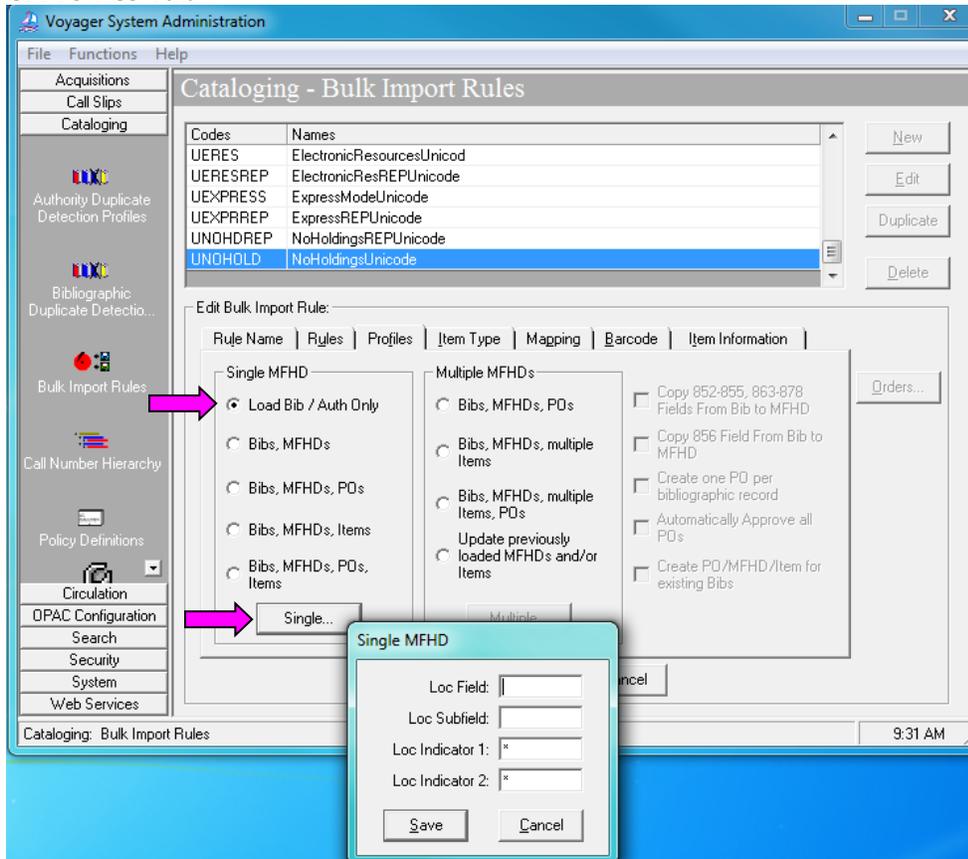
Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC 21 UTF-8</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

### C. Profiles Tab



Cataloging- Bulk Import Rules – Profiles Tab

1. Click [Load Bib/Auth Only].
2. Click [Single...] to open the Single MFHD window.

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	*
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	*

3. Click [Save] on Single MFHD window.
4. Click [Save] on Bulk Import Rules window.

**The above are the only values needed for this rule.**

There is no need to enter data on the Item Type, Mapping, Barcode, or Item Information tabs for No Holdings Mode for Unicode.

There are no optional settings applicable to this bulk import rule.

Legend:

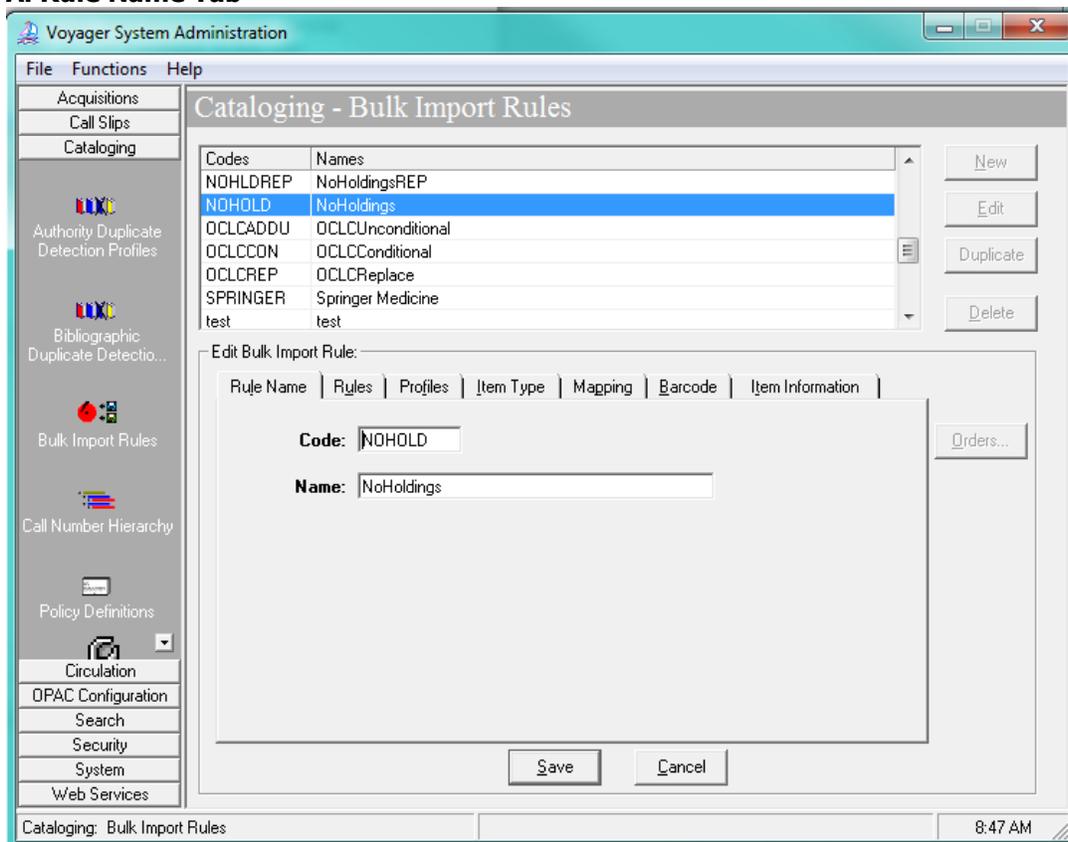
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## No Holdings Mode (to implement at a future date)

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

For the No Holdings Mode rule, you will only need to define the Rule Code, Rule Name, and the various entries on the Rules and Profiles tab. The Item Type, Mapping, Barcode, and Item Information tabs are not populated in this rule.

### A. Rule Name Tab



*Cataloging- Bulk Import Rules – Rule Name Tab*

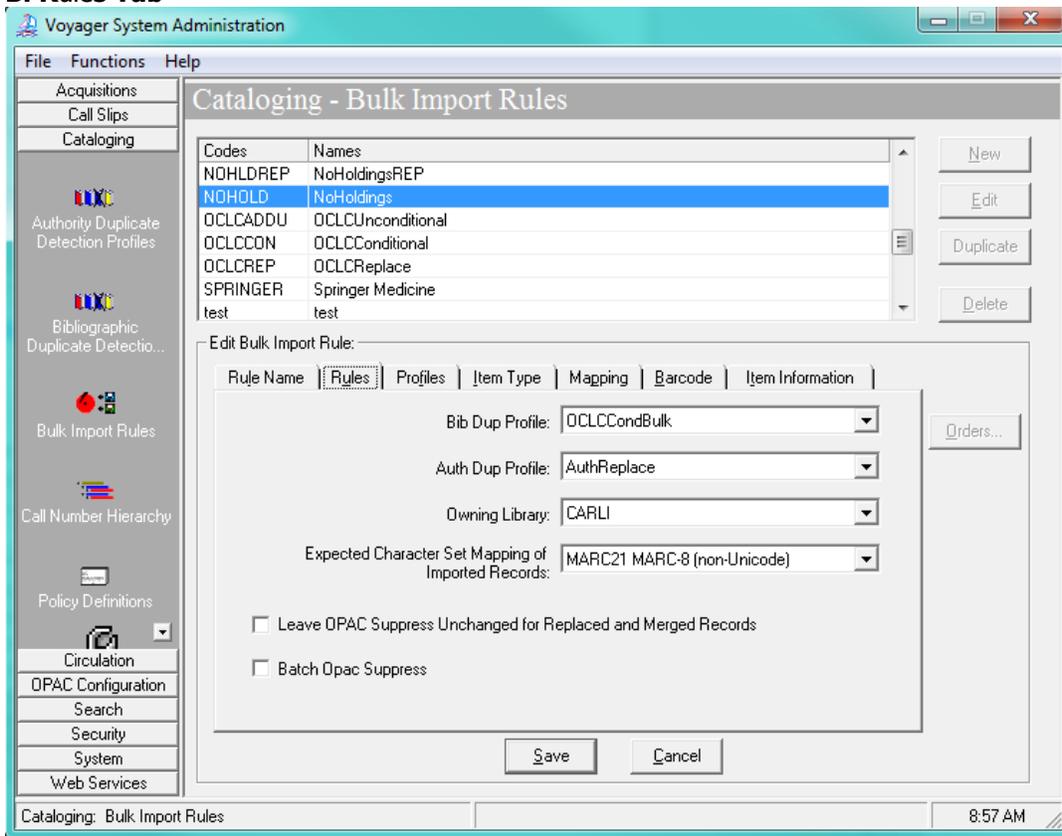
Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>NOHOLD</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>NoHoldings</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## B. Rules Tab



*Cataloging- Bulk Import Rules – Rules Tab*

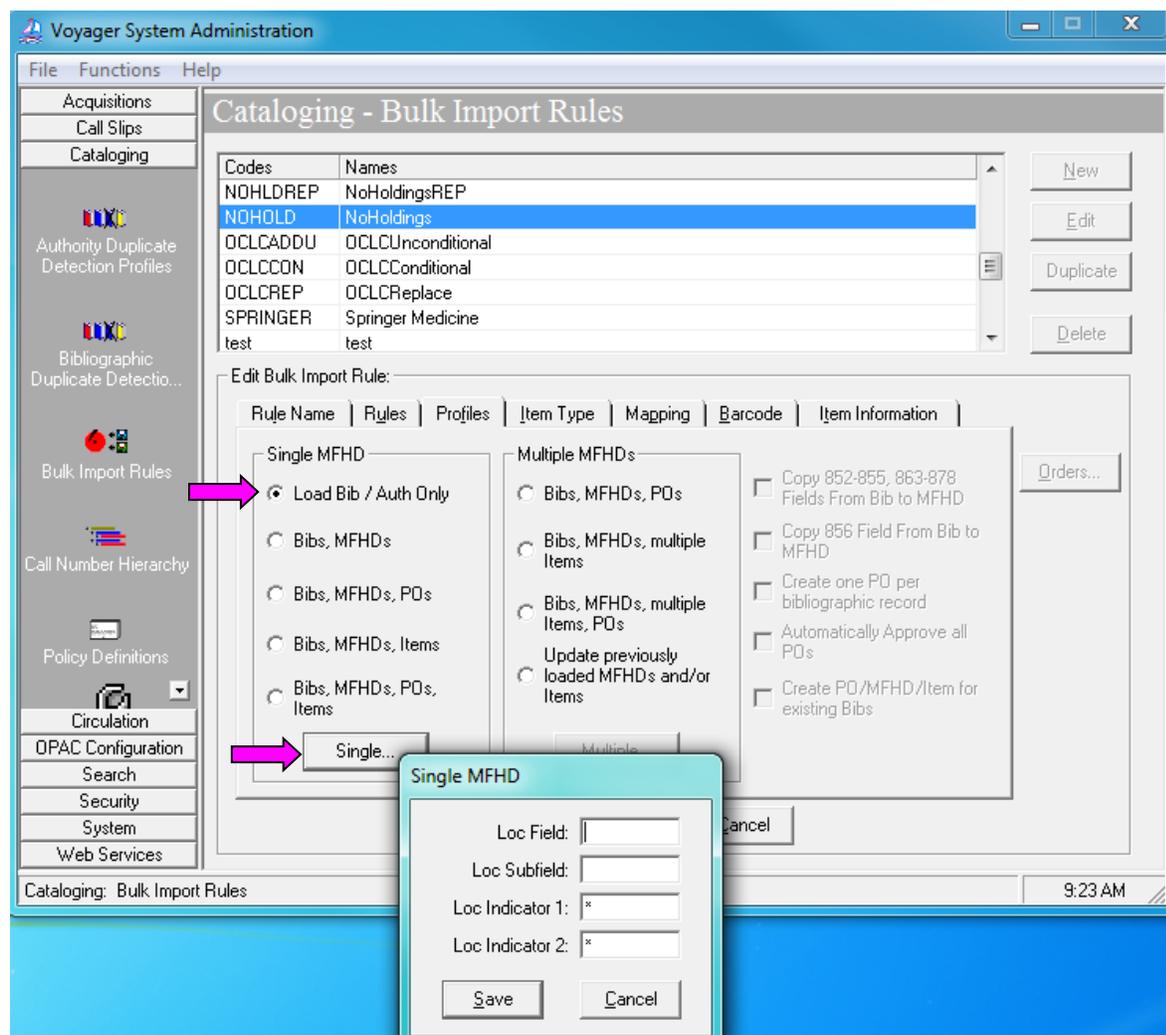
Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owing Library:</b>	select your library's Owing Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	<b>typically leave deselected, note VI.A. above.</b>
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	<b>leave deselected</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## C. Profiles Tab



1. Click [Load Bib/Auth Only].
2. Click [Single...] to open the Single MFHD window.

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	*
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	*

3. Click [Save] on Single MFHD window.
4. Click [Save] on Bulk Import Rules window.

### The above are the only values needed for this rule.

There is no need to enter data on the Item Type, Mapping, Barcode, and Item Information tabs for No Holdings Mode.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

There are no optional settings applicable to this bulk import rule.

## No Holdings Replace Mode for Unicode

For the No Holdings Replace Mode for Unicode rule, you will only need to define the Rule Code, Rule Name, and the various entries on the Rules and Profiles tab. The Item Type, Mapping, Barcode, and Item Information tabs are not populated in this rule.

See the sample screen shots for No Holdings Mode for Unicode above, but enter the following data for the No Holdings Replace Mode for Unicode bulk import rule.

### A. Rule Name Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>UNOHDREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>NoHoldingsREPUncode</b>

### B. Rules Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC 21 UTF-8</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

### C. Profiles Tab

1. Click [Load Bib/Auth Only].
2. Click [Single...] to open the Single MFHD window.

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	*
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	*

3. Click [Save] on Single MFHD window.
4. Click [Save] on Bulk Import Rules window.

### The above are the only values needed for this rule.

There is no need to enter data on the Item Type, Mapping, Barcode, or Item Information tabs for No Holdings Replace Mode for Unicode.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## No Holdings Replace Mode (to implement at a future date)

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

For the No Holdings Replace Mode rule, you will only need to define the Rule Code, Rule Name, and the various entries on the Rules tab. The Item Type, Mapping, and Barcode tabs are not populated in this rule.

See the sample screen shots for No Holdings Mode above, but enter the following data for the No Holdings Replace Mode bulk import rule.

### A. Rule Name Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>NOHLDREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>NoHoldingsREP</b>

### B. Rules Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

### C. Profiles Tab

1. Click [Load Bib/Auth Only].
2. Click [Single...] to open the Single MFHD window.

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<i>Blank</i>
<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	*
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	*

3. Click [Save] on Single MFHD window.
4. Click [Save] on Bulk Import Rules window.

### The above are the only values needed for this rule.

There is no need to enter data on the Item Type, Mapping, Barcode, or Item Information tabs for No Holdings Replace Mode.

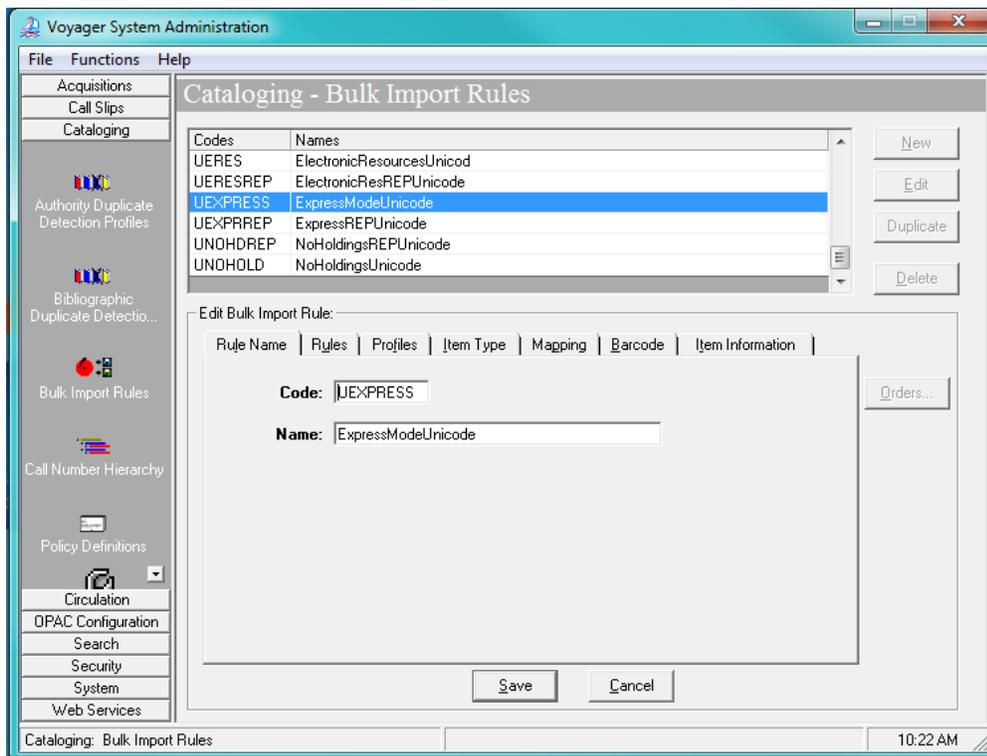
Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## Express Mode for Unicode

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

### A. Rule Name Tab



*Cataloging- Bulk Import Rules – Rule Name Tab*

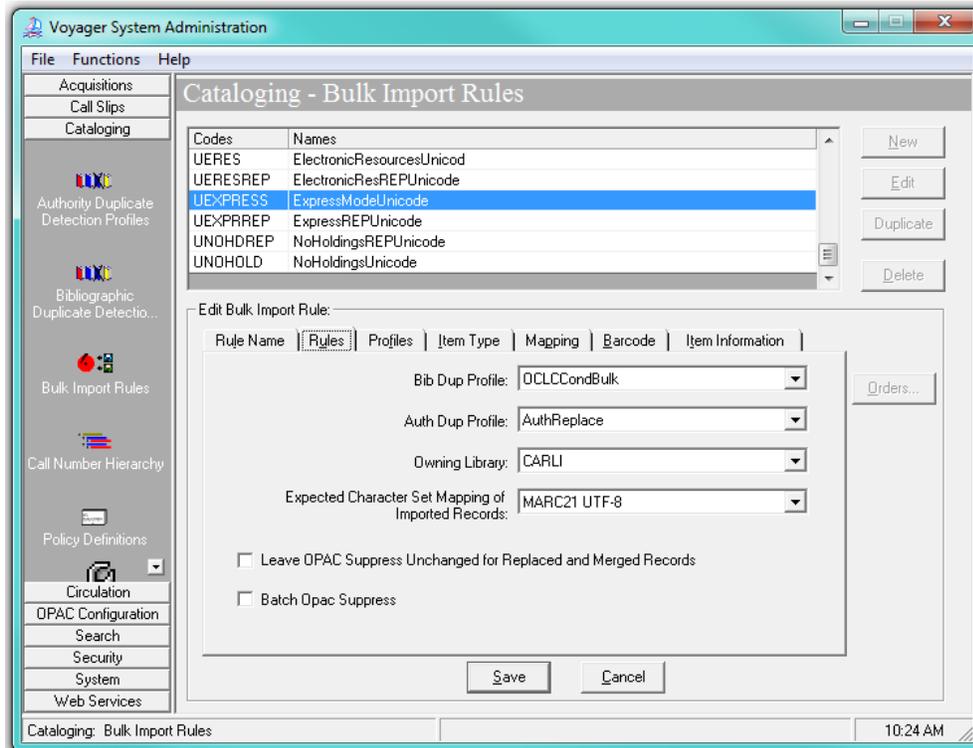
Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>UEXPRESS</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>ExpressModeUnicode</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## B. Rules Tab



*Cataloging- Bulk Import Rules – Rules Tab*

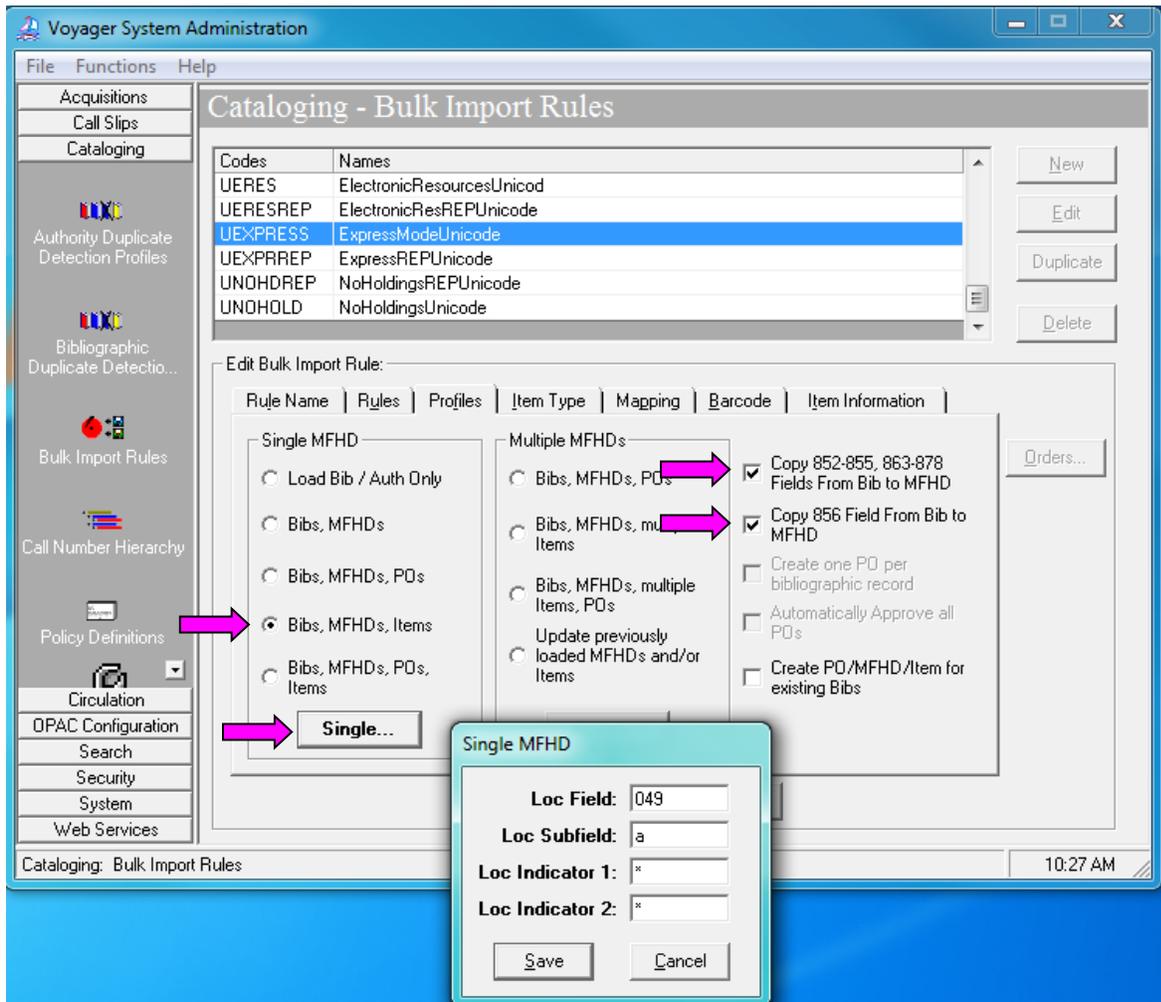
Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 UTF-8</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

### C. Profiles Tab



Cataloging- Bulk Import Rules – Profiles Tab

1. Click [Bibs, MFHDs, Items]
2. Select the following:

<input checked="" type="checkbox"/> <b>Copy 852-855, 863-878 Fields From Bib to MFHD:</b>	<b>Recommended to check.</b>
<input checked="" type="checkbox"/> <b>Copy 856 Field From Bib to MFHD:</b>	<b>Recommended to check.</b>

See section VI.B above for a description of the “Create PO/MFHD/Item for existing Bibs” option.

3. Click [Single...] to open the Single MFHD window

Enter the following data:

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<b>a</b>

Legend:

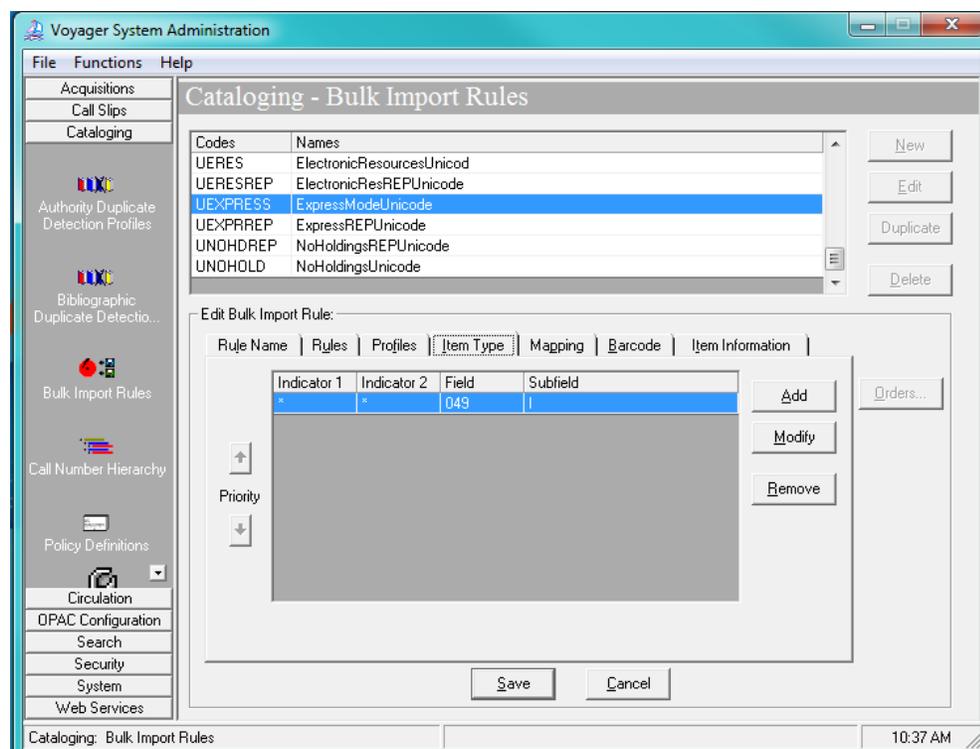
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	*
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	*

4. Click [Save] to save the Single MFHD window settings.

See the *Voyager 9.1.1 System Administration User's Guide*, page 4-46 for a general description of these options.

## D. Item Type Tab



*Cataloging- Bulk Import Rules – Item Type Tab*

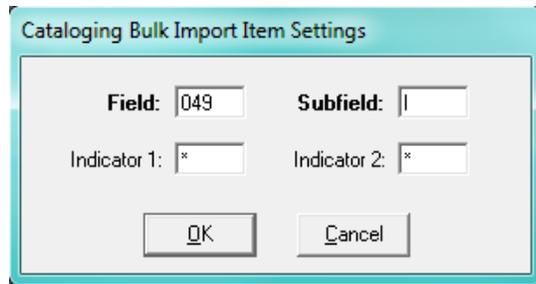
This entry identifies where bulk import will find the data that is mapped to the item record's Item Type field.

1. Click [Add].
2. Enter the following data

<input checked="" type="checkbox"/> <b>Field:</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Subfield:</b>	<b>I (that's the letter EL, not the number one)</b>
<input checked="" type="checkbox"/> <b>Indicator 1:</b>	*
<input checked="" type="checkbox"/> <b>Indicator 2:</b>	*

Legend:

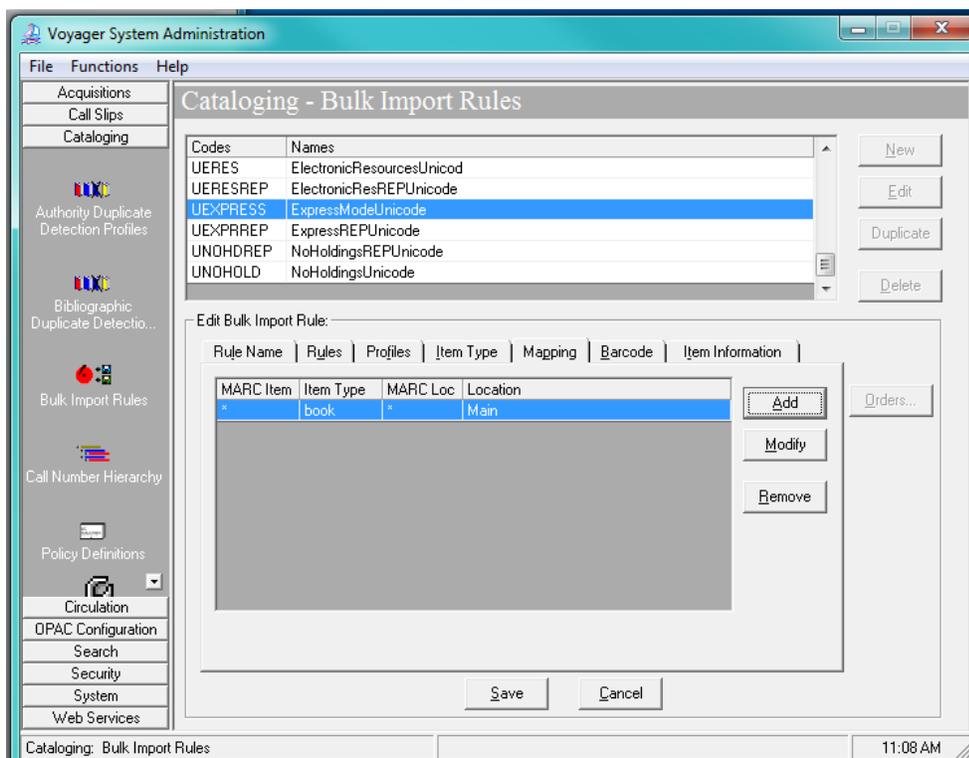
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging – Bulk Import Rules – Item Type Tab – Item Settings dialog box*

3. Click [OK].

## E. Mapping Tab



*Cataloging- Bulk Import Rules – Mapping Tab*

In this area, you will enter all of the combinations of Voyager item type codes (049 \$I) and OCLC holding library codes (049 \$a) used at your library.

1. Click [Add].
2. Enter the appropriate values for your library.
3. Click [OK].
4. If additional mappings are needed, click [Add] again and enter the mapping data; repeat until all combinations of Voyager item type and OCLC holdings symbols that match your library's cataloging policies are accounted for in this rule.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Enter the following data:

<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<p><b>Enter the abbreviated Voyager item type code that is entered in the 049 \$I.</b></p> <p>See section VII for the list of valid abbreviations for this field. Only these abbreviations can be entered in 049 \$I and therefore mapped to the Voyager item record.</p>
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<p><b>Enter the 4-character OCLC holding code symbol from the 049 \$a.</b></p>
<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<p><b>Enter the full Item type name to which the item type abbreviation entered in 049 \$I should map.</b></p>
<input checked="" type="checkbox"/> <b>Voyager Location:</b>	<p><b>Enter the Voyager location name to which this OCLC holding symbol should map.</b></p> <p>Libraries may want to consult the decisions made in their ABBA tables for the MFHD/item record conversion to Voyager, to enter consistent mappings here.</p>
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<p><b>Select the appropriate call number hierarchy for this mapping.</b></p> <p>If the library has multiple hierarchies established, you can use a different hierarchy for the different rows in the Mapping table, as appropriate to the library's cataloging workflow. For example, materials mapped to an AV location can use the Other hierarchy while the rest of the Mapping table uses the LC hierarchy.</p>

*Cataloging- Bulk Import Rules – Mapping Tab Settings dialog box*

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

Here is an **example of a very simple mapping table.**

Do not simply duplicate this example; create a mapping table that suits your collection.

MARC Item Type	Voyager Item Type	MARC Loc Code	Voyager Location	Call No. Hierarchy
Bkn	BookN	ABCR	Reference	LC
Bkn	BookN	ABCB	Archives	LC
bk1	Book1	ABCA	Stacks	LC
Sern	SerialN	ABCP	PerNC	LC
ser1	Serial1	ABCQ	PerStacks	LC
rec1	Recording1	ABCM	Music	LC
Vidn	VideoN	ABCV	AVNC	Other
vid1	Video1	ABCW	AV	Other
*	Error	*	Stacks	LC

⊕ **NOTE:** Libraries must add a final row to their mapping that is used as the default values to catch any transactions that fall through the cracks. This row must be the final row; anything below it will not be read.

*Cataloging – Bulk Import Rules – Mapping Tab Settings – Default row example*

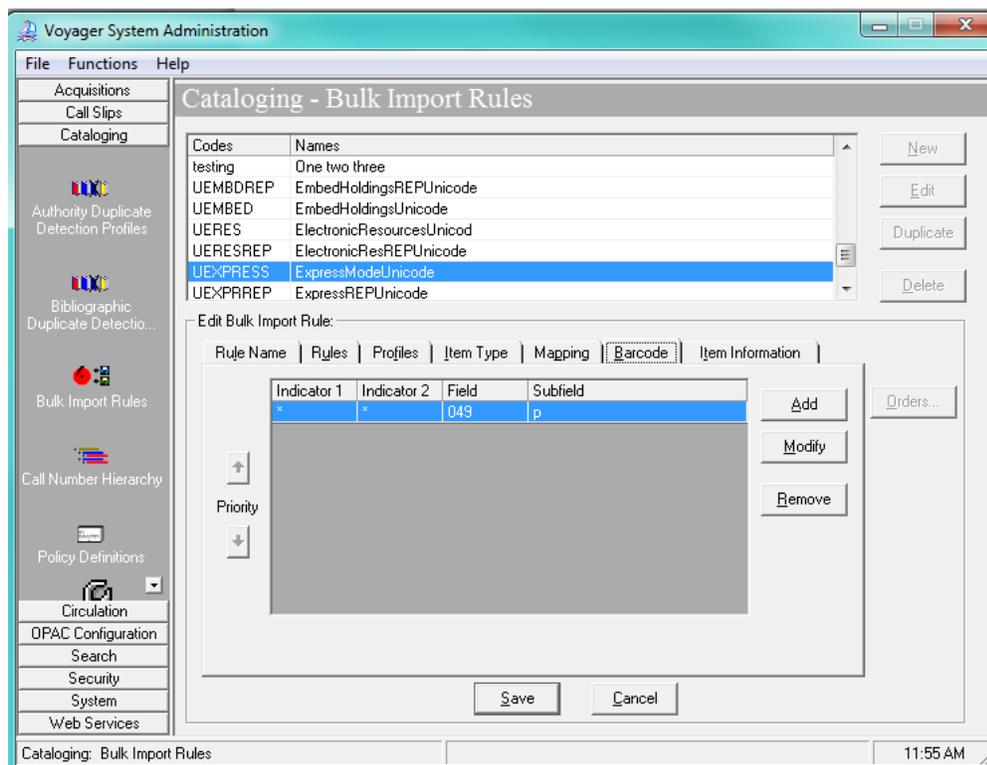
<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<p><b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b></p> <p>A suggestion is to use the same values your library used in the "review row" of your ABBA table in the</p>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

<input checked="" type="checkbox"/> <b>Voyager Location:</b>	conversion to Voyager. <b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b>  A suggestion is to use the same values your library used in the "review row" of your ABBA table in the conversion to Voyager.
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<b>Enter the appropriate call number hierarchy</b>

## F. Barcode Tab



*Cataloging- Bulk Import Rules – Barcode Tab*

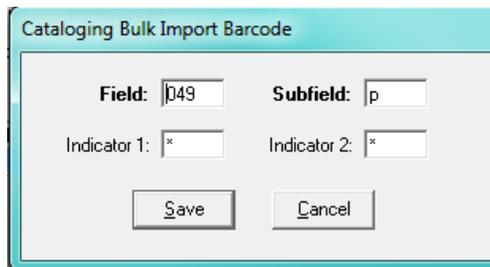
This entry identifies where bulk import will find the data in the OCLC transaction that is mapped to item record's Barcode field.

1. Click [Add].
2. Enter the following data:

<input checked="" type="checkbox"/> <b>Field:</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Subfield:</b>	<b>p</b>
<input checked="" type="checkbox"/> <b>Indicator 1:</b>	<b>*</b>
<input checked="" type="checkbox"/> <b>Indicator 2:</b>	<b>*</b>

Legend:

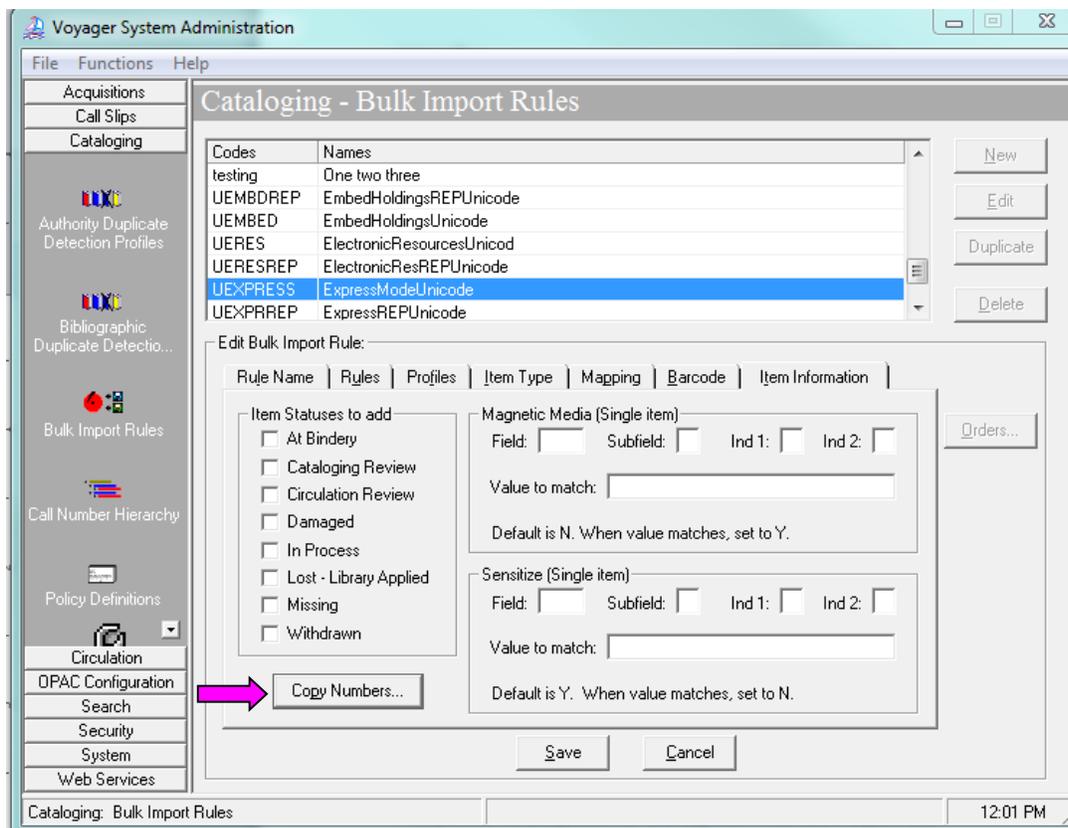
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging- Bulk Import Rules – Barcode Tab Settings dialog box*

3. Click [Save] to save the Barcode tab values.

### G. Item Information Tab

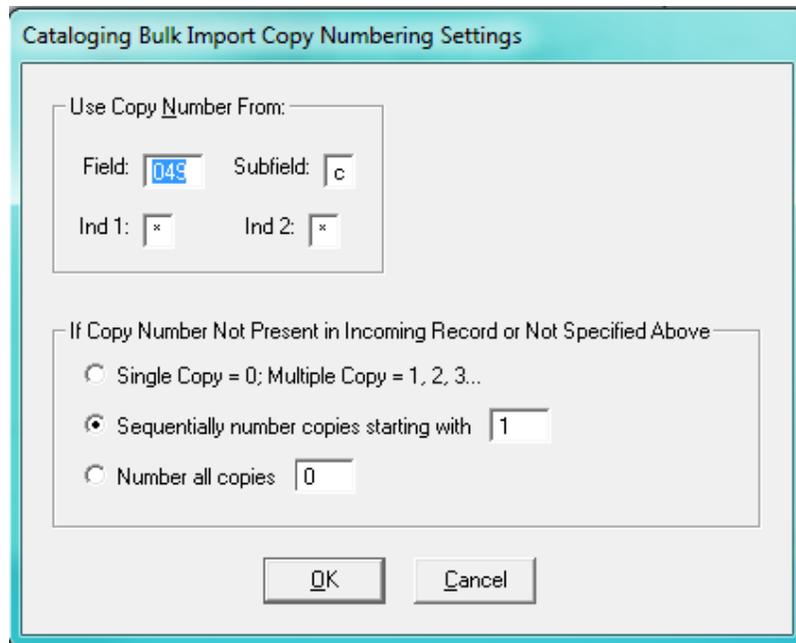


*Cataloging- Bulk Import Rules – Item Information Tab*

1. Select [Copy Numbers...] to open the Copy Numbering Settings dialog box.

#### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value



*Cataloging- Bulk Import Rules – Item Information Tab – Copy Numbering Settings dialog box*

2. For [Use Copy Number From:] Enter the following data

<input checked="" type="checkbox"/> <b>Field</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Subfield</b>	<b>c</b>
<input checked="" type="checkbox"/> <b>Ind 1</b>	<b>*</b>
<input checked="" type="checkbox"/> <b>Ind 2</b>	<b>*</b>

3. For [If Copy Number Not Present in Incoming Record or Not Specified Above], select Sequentially number copies starting with, and enter the value of 1

<input checked="" type="checkbox"/> <b>Sequentially number copies starting with</b>	<b>1</b>
---	----------

4. Click [OK] when finished.

<b>Item statuses to add</b>	all deselected by default
<b>Magnetic Media [Single Item]</b>	Blank by default
<b>Sensitize [Single Item]</b>	Blank by default

If you are considering adding values to these areas, general information can be found in the *System Administration User's Guide* beginning on p. 4-71.

After all entries have been made to the Rule Name, Rules, Profiles, Item Type, Mapping, Barcode, and Item Information tabs, click **Save** to save the new bulk import rule.

**NOTE: If the Save button is grayed out, this usually means that the Mapping tab doesn't have a final entry with asterisks in both the MARC item and MARC Loc fields.** Go back to the Mapping tab and add this required field, and try to save the bulk import rule again.

Legend:

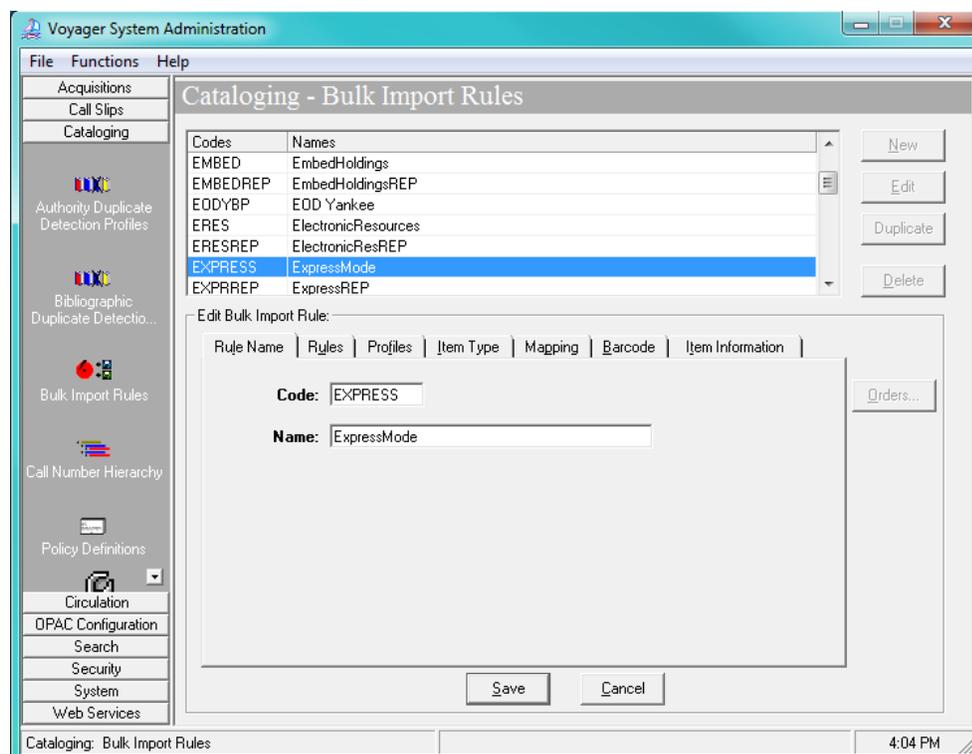
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

The process is completed for the Express Mode for Unicode bulk import rule.

## Express Mode (to implement at a future date)

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

### A. Rule Name Tab



*Cataloging- Bulk Import Rules – Rule Name Tab*

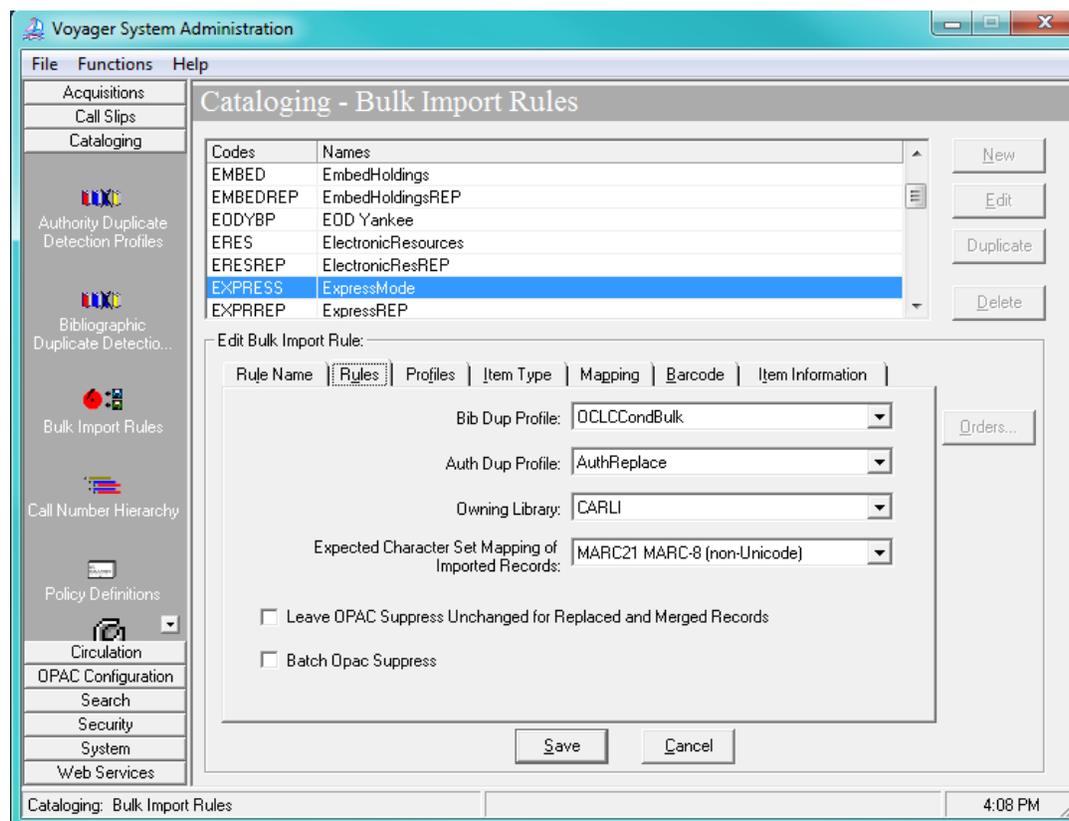
Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>EXPRESS</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>ExpressMode</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## B. Rules Tab



*Cataloging- Bulk Import Rules – Rules Tab*

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

### C-G.

Enter the remaining settings for Profiles, Item Type, Mapping, Barcode, and Item Information tabs as described in sections C-G of the Express Mode for Unicode bulk import rule, above.

## Express Replace Mode for Unicode

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## A. Rule Name Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>UEXPRREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>ExpressREPUncode</b>

## B. Rules Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 UTF-8</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

## C-G.

Enter the remaining settings for Profiles, Item Type, Mapping, Barcode, and Item Information tabs as described in sections C-G of the Express Mode for Unicode bulk import rule, above.

## Express Replace Mode (to implement at a future date)

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

See the sample screen shots for Express Mode above, but enter the following data for the Express Replace Mode bulk import rule.

## A. Rule Name Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>EXPRREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>ExpressREP</b>

## B. Rules Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

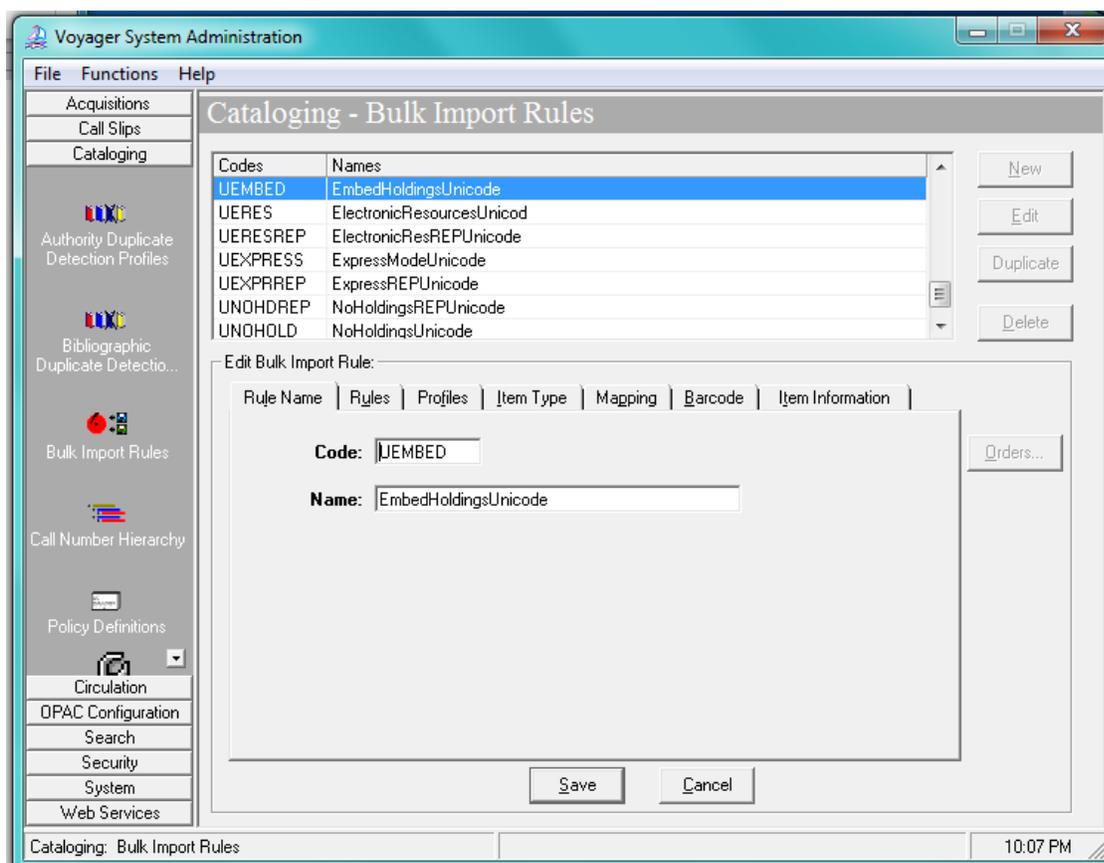
## C-G.

Enter the remaining settings for Profiles, Item Type, Mapping, Barcode, and Item Information tabs as described in sections C-G of the Express Mode for Unicode bulk import rule, above.

## Embedded Holdings Mode for Unicode

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

### A. Rule Name Tab



*Cataloging - Bulk Import Rules - Rule Name Tab*

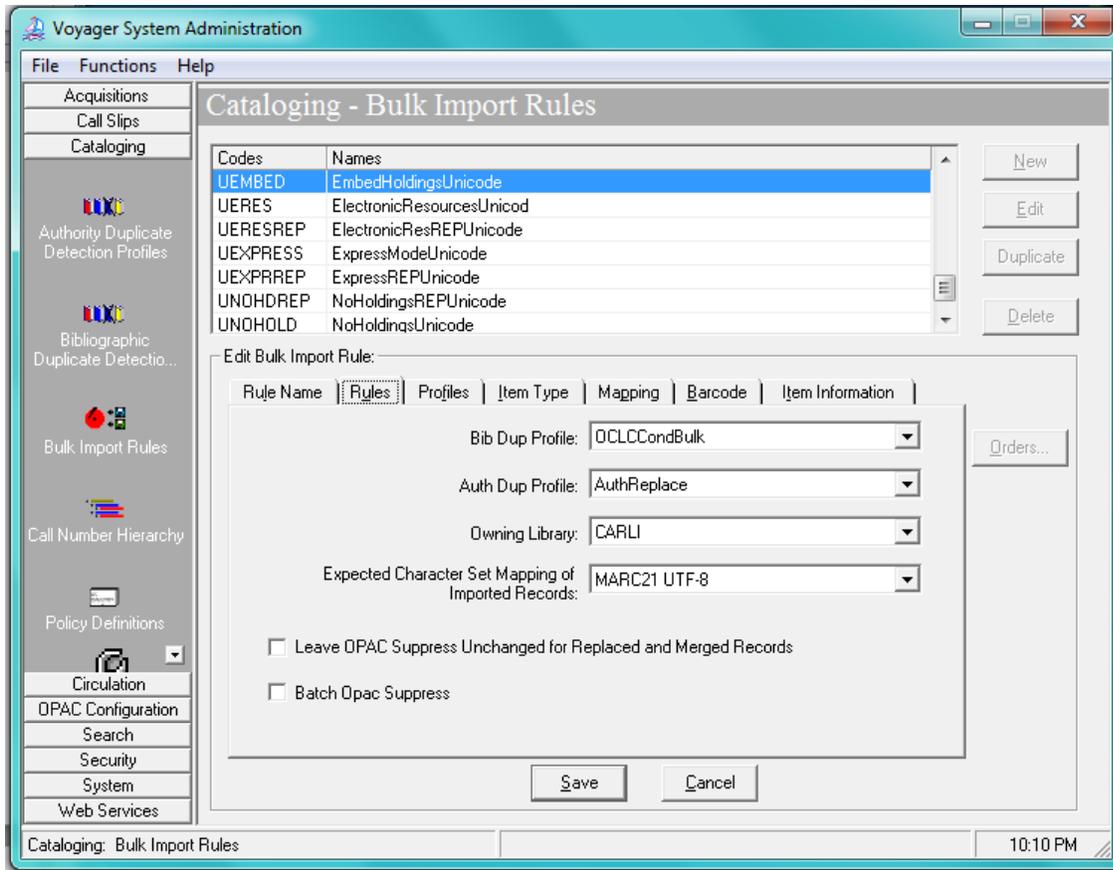
Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>UEMBED</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>EmbedHoldingsUnicode</b>

### B. Rules Tab

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging – Bulk Import Rules – Rules Tab*

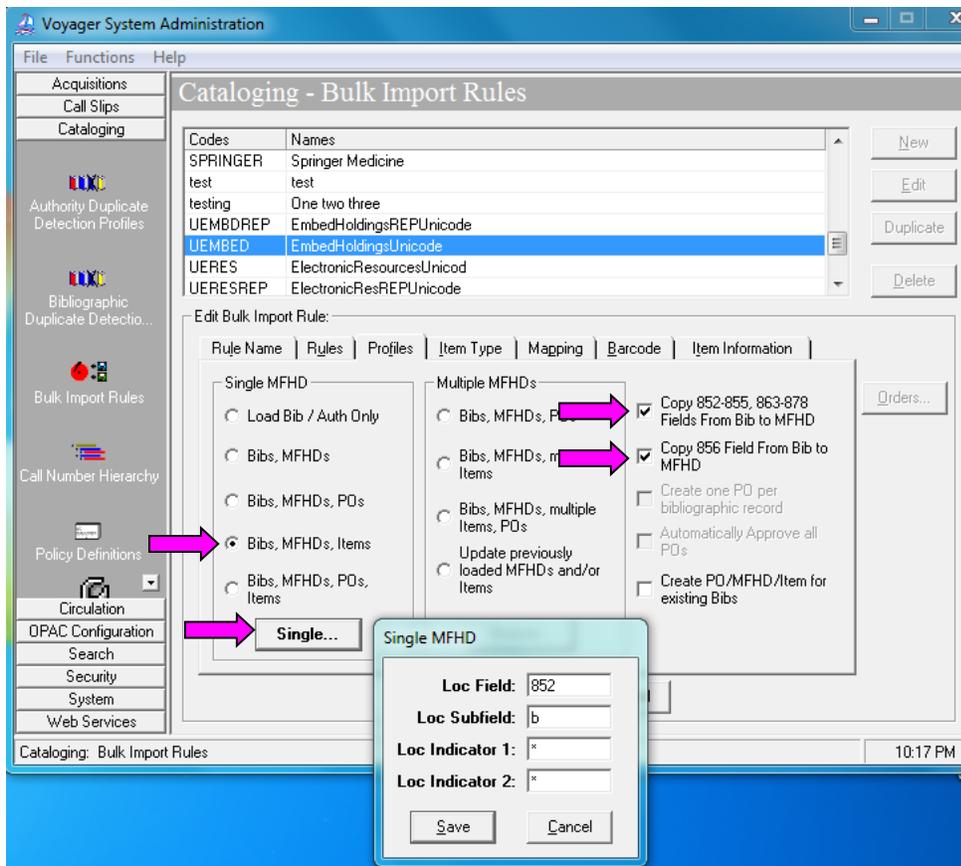
Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 UTF-8</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

### C. Profiles Tab

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging – Bulk Import Rules – Profiles Tab*

1. Click [Bibs, MFHDs, Items]
2. Select the following:

<input checked="" type="checkbox"/> <b>Copy 852-855, 863-878 Fields From Bib to MFHD:</b>	<b>MUST be checked.</b>
<input checked="" type="checkbox"/> <b>Copy 856 Field From Bib to MFHD:</b>	<b>Recommended to check.</b>

See section VI.B above for a description of the “Create PO/MFHD/Item for existing Bibs” option.

3. Click [Single...] to open the Single MFHD window  
Enter the following data:

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<b>852</b>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<b>b</b>
<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	<b>*</b>
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	<b>*</b>

4. Click [Save] to save the Single MFHD window settings.

See the *Voyager 9.1.1 System Administration User's Guide*, page 4-46 for a general description of these options.

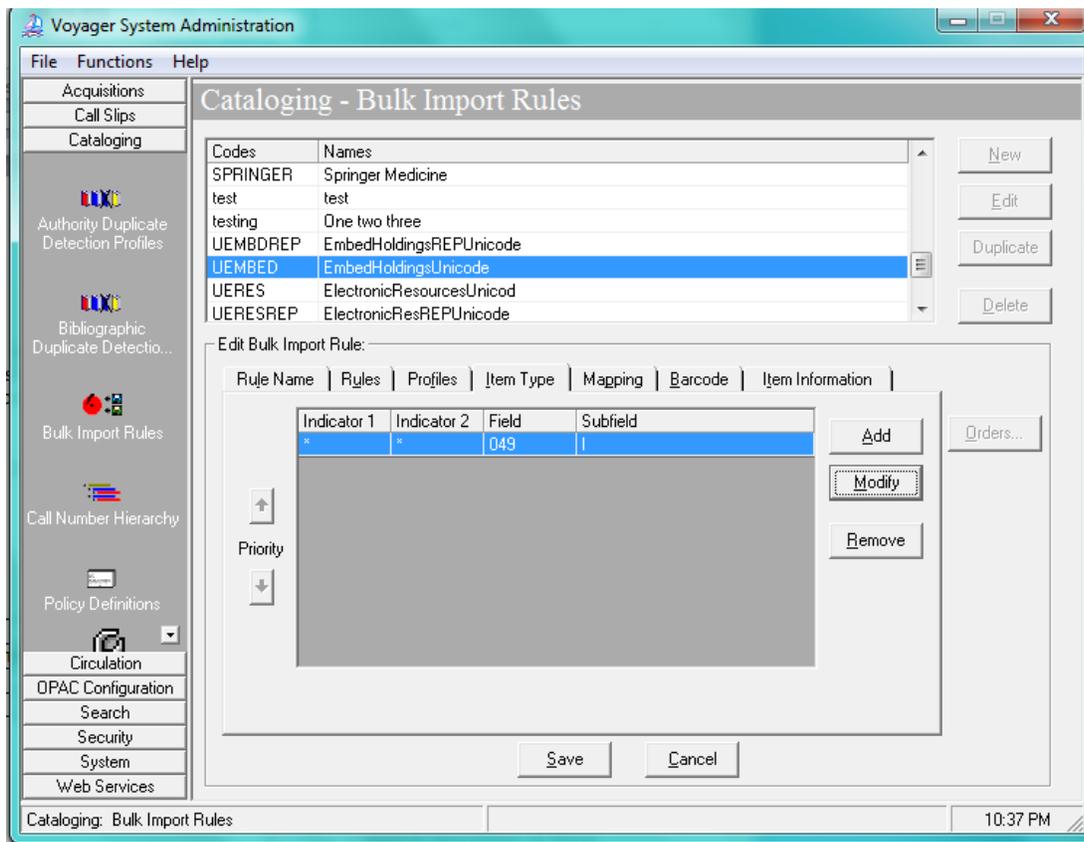
Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

NOTE: It is critical that the Location fields in the Embedded Holdings Mode bulk import rule are set to the 852 subfield b, rather than the 049 subfield a. This also means that cataloging staff must remember to enter the 852 field explicitly in records that are to be processed in Embedded Holdings Mode.

#### D. Item Type Tab

This entry identifies where bulk import will find the data that is mapped to the item record's Item Type field.



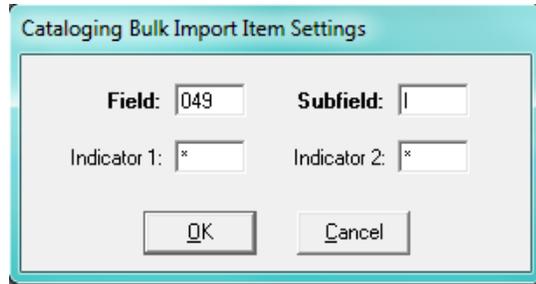
*Cataloging – Bulk Import Rules – Item Type Tab*

1. Click [Add].
2. Enter the following data

<input checked="" type="checkbox"/> <b>Field:</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Subfield:</b>	<b>I (that's the letter EL, not the number one)</b>
<input checked="" type="checkbox"/> <b>Indicator 1:</b>	*
<input checked="" type="checkbox"/> <b>Indicator 2:</b>	*

Legend:

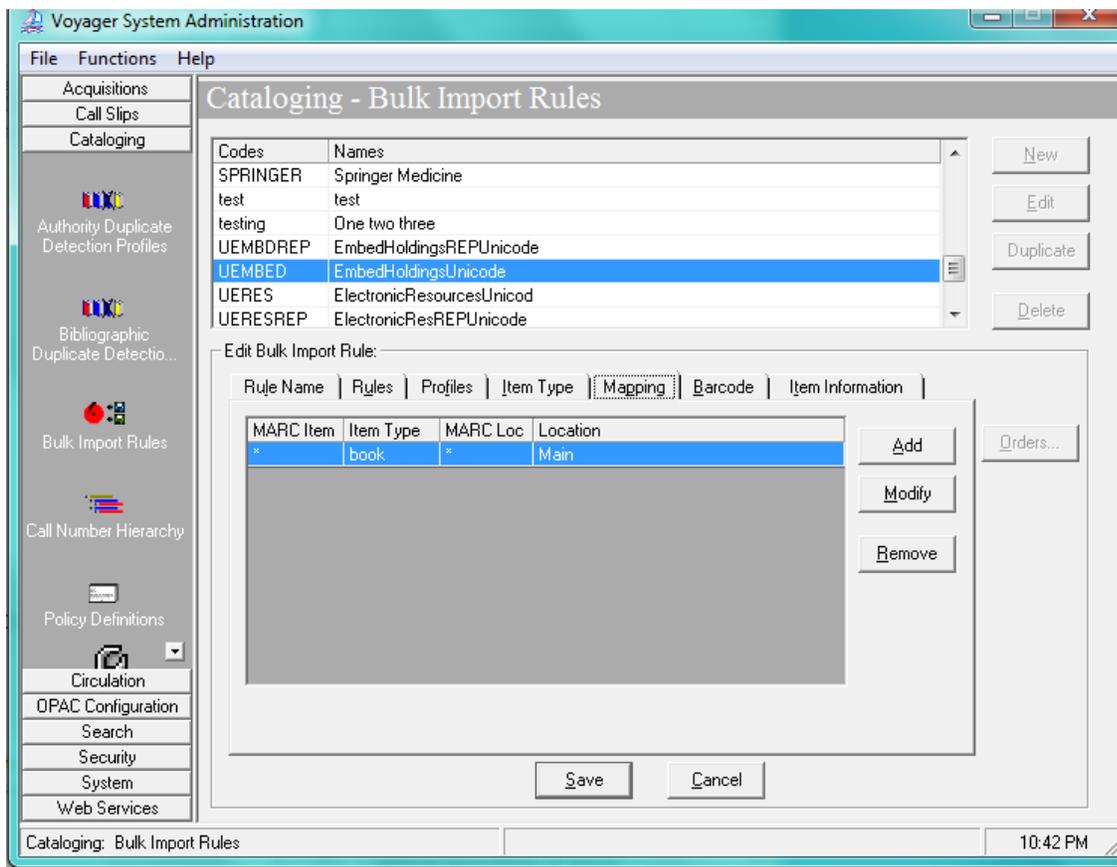
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging – Bulk Import Rules – Item Type Tab – Item Settings dialog box*

3. Click [OK].

## E. Mapping Tab



*Cataloging- Bulk Import Rules – Mapping Tab*

In this area, you will enter all of the combinations of Voyager item type codes (049 \$I) and OCLC holding library codes (049 \$a) used at your library.

1. Click [Add].
2. Enter the appropriate values for your library.
3. Click [OK].

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

4. If additional mappings are needed, click [Add] again and enter the mapping data; repeat until all combinations of Voyager item type and OCLC holdings symbols that match your library's cataloging policies are accounted for in this rule.

Enter the following data:

<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<p><b>Enter the abbreviated Voyager item type code that is entered in the 049 \$I.</b></p> <p>See section VII for the list of valid abbreviations for this field. Only these abbreviations can be entered in 049 \$I and therefore mapped to the Voyager item record.</p>
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<p><b>Enter the 4-character OCLC holding code symbol from the 049 \$a.</b></p>
<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<p><b>Enter the full Item type name to which the item type abbreviation entered in 049 \$I should map.</b></p>
<input checked="" type="checkbox"/> <b>Voyager Location:</b>	<p><b>Enter the Voyager location name to which this OCLC holding symbol should map.</b></p> <p>Libraries may want to consult the decisions made in their ABBA tables for the MFHD/item record conversion to Voyager, to enter consistent mappings here.</p>
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<p><b>Select the appropriate call number hierarchy for this mapping.</b></p> <p>If the library has multiple hierarchies established, you can use a different hierarchy for the different rows in the Mapping table, as appropriate to the library's cataloging workflow. For example, materials mapped to an AV location can use the Other hierarchy while the rest of the Mapping table uses the LC hierarchy.</p>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

*Cataloging- Bulk Import Rules – Mapping Tab Settings dialog box*

Here is an **example of a very simple mapping table.**

Do not simply duplicate this example; create a mapping table that suits your collection.

MARC Item Type	Voyager Item Type	MARC Loc Code	Voyager Location	Call No. Hierarchy
Bkn	BookN	ABCR	Reference	LC
Bkn	BookN	ABCB	Archives	LC
bk1	Book1	ABCA	Stacks	LC
Sern	SerialN	ABCP	PerNC	LC
ser1	Serial1	ABCQ	PerStacks	LC
rec1	Recording1	ABCM	Music	LC
Vidn	VideoN	ABCV	AVNC	Other
vid1	Video1	ABCW	AV	Other
*	Error	*	Stacks	LC

**⊕ NOTE: Libraries must add a final row to their mapping that is used as the default values to catch any transactions that fall through the cracks. This row must be the final row; anything below it will not be read.**

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

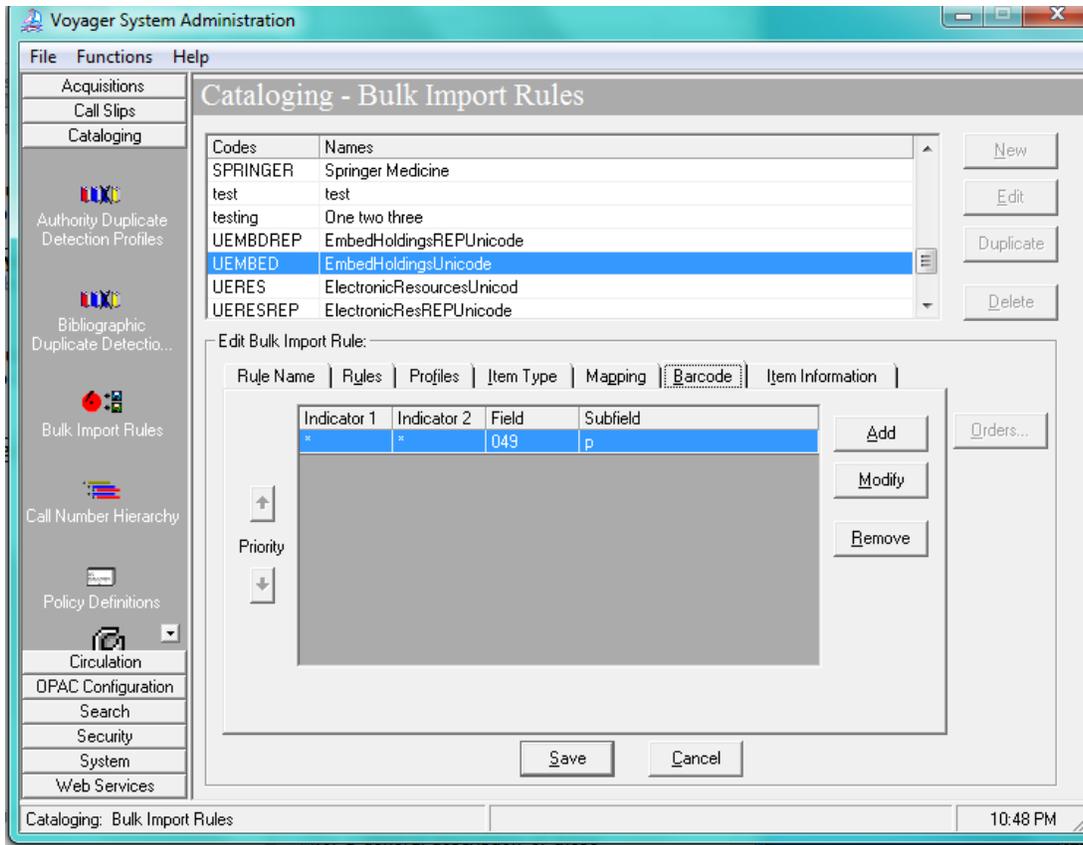
*Cataloging – Bulk Import Rules – Mapping Tab Settings – Default row example*

<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<p><b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b></p> <p>A suggestion is to use the same values your library used in the "review row" of your ABBA table in the conversion to Voyager.</p>
<input checked="" type="checkbox"/> <b>Voyager Location:</b>	<p><b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b></p> <p>A suggestion is to use the same values your library used in the "review row" of your ABBA table in the conversion to Voyager.</p>
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<b>Enter the appropriate call number hierarchy</b>

## F. Barcode Tab

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

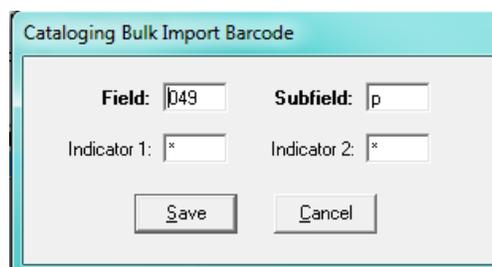


*Cataloging- Bulk Import Rules – Barcode Tab*

This entry identifies where bulk import will find the data in the OCLC transaction that is mapped to item record's Barcode field.

1. Click [Add].
2. Enter the following data:

<input checked="" type="checkbox"/> <b>Field:</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Subfield:</b>	<b>p</b>
<input checked="" type="checkbox"/> <b>Indicator 1:</b>	<b>*</b>
<input checked="" type="checkbox"/> <b>Indicator 2:</b>	<b>*</b>



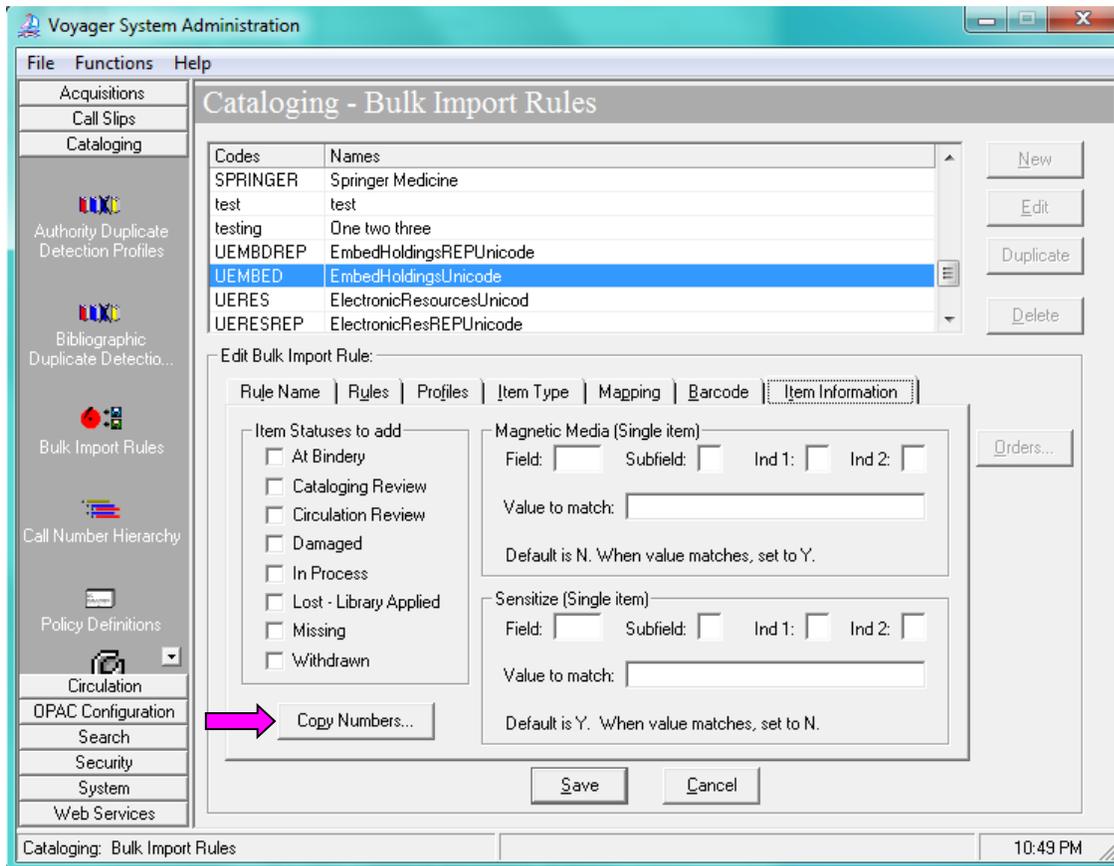
*Cataloging- Bulk Import Rules – Barcode Tab Settings dialog box*

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

3. Click [Save] to save the Barcode tab values.

## G. Item Information Tab

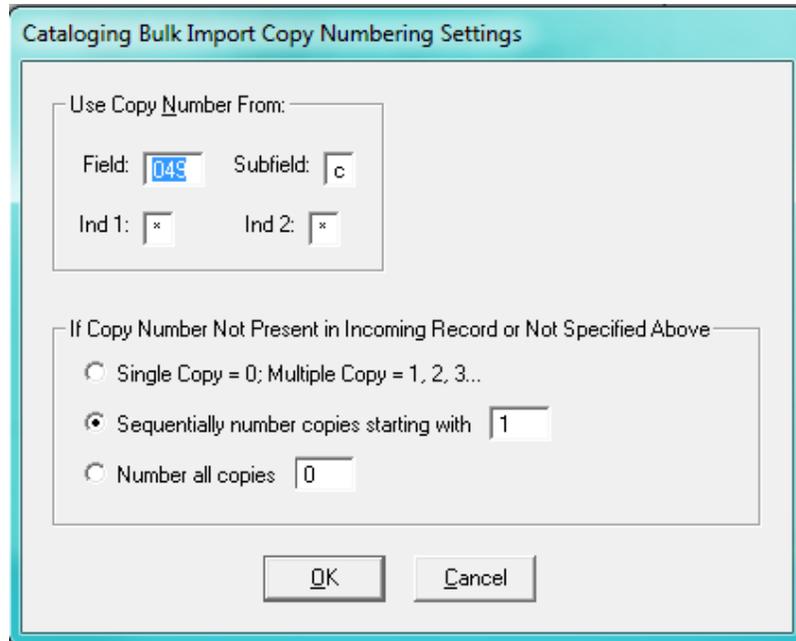


*Cataloging- Bulk Import Rules – Item Information Tab*

1. Select [Copy Numbers...] to open the Copy Numbering Settings dialog box.

### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging- Bulk Import Rules – Item Information Tab – Copy Numbering Settings dialog box*

2. For [Use Copy Number From:] Enter the following data

<input checked="" type="checkbox"/> <b>Field</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Subfield</b>	<b>c</b>
<input checked="" type="checkbox"/> <b>Ind 1</b>	<b>*</b>
<input checked="" type="checkbox"/> <b>Ind 2</b>	<b>*</b>

3. For [If Copy Number Not Present in Incoming Record or Not Specified Above], select Sequentially number copies starting with, and enter the value of 1

<input checked="" type="checkbox"/> <b>Sequentially number copies starting with</b>	<b>1</b>
---	----------

4. Click [OK] when finished.

<b>Item statuses to add</b>	all deselected by default
<b>Magnetic Media [Single Item]</b>	Blank by default
<b>Sensitize [Single Item]</b>	Blank by default

If you are considering adding values to these areas, general information can be found in the *System Administration User's Guide* beginning on p. 4-71.

After all entries have been made to the Rule Name, Rules, Profiles, Item Type, Mapping, Barcode, and Item Information tabs, click **Save** to save the new bulk import rule.

**NOTE: If the Save button is grayed out, this usually means that the Mapping tab doesn't have a final entry with asterisks in both the MARC item and MARC Loc fields.** Go back to the Mapping tab and add this required field, and try to save the bulk import rule again.

Legend:

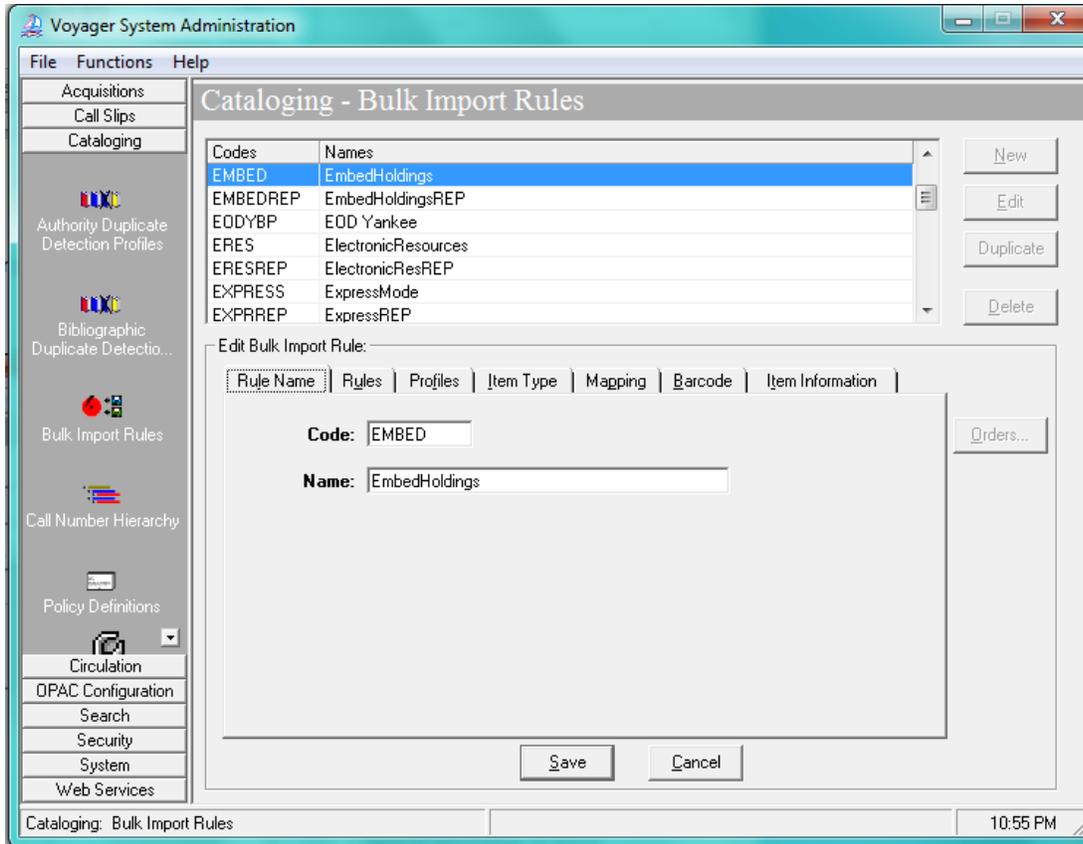
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

The process is completed for the Embedded Holdings Mode for Unicode.

## Embedded Holdings Mode (to implement at a future date)

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its data requirements.

### A. Rule Name Tab



*Cataloging- Bulk Import Rules – Rule Name Tab*

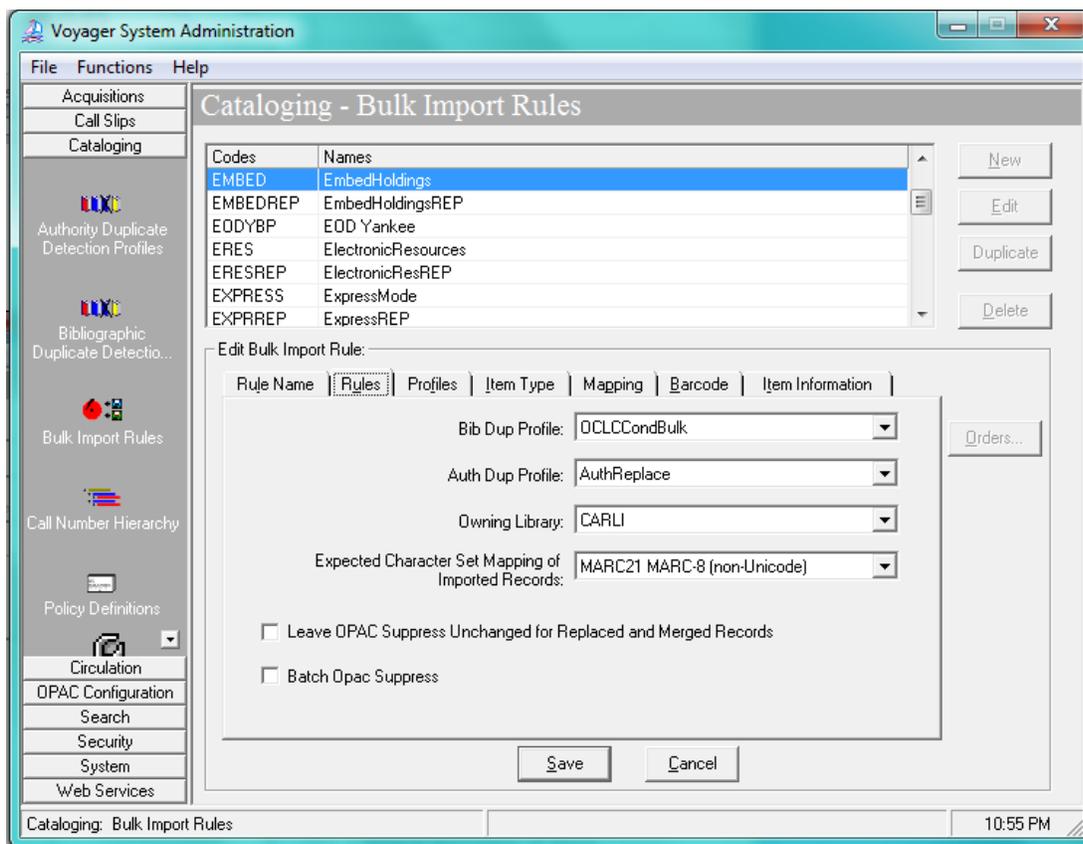
Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>EMBED</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>EmbedHoldings</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## B. Rules Tab



*Cataloging- Bulk Import Rules – Rules Tab*

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

### C-G.

Enter the remaining settings for Profiles, Item Type, Mapping, Barcode, and Item Information tabs as described in sections C-G of the Embedded Holdings Mode for Unicode bulk import rule, above.

## Embedded Holdings Replace Mode for Unicode

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its OCLC transaction data entry requirements.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## A. Rule Name Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>UEMBDREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>EmbedHoldingsREPUnicode</b>

## B. Rules Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile</b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping</b>	<b>MARC21 UTF-8</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

## C-G.

Enter the remaining settings for Profiles, Item Type, Mapping, Barcode, and Item Information tabs as described in sections C-G of the Embedded Holdings Mode for Unicode bulk import rule, above.

## Embedded Holdings Replace Mode (to implement at a future date)

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its OCLC transaction data entry requirements.

## A. Rule Name Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>EMBEDREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>EmbedHoldingsREP</b>

## B. Rules Tab

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

## C-G.

Enter the remaining settings for Profiles, Item Type, Mapping, Barcode, and Item Information tabs as described in sections C-G of the Embedded Holdings Mode for Unicode bulk import rule, above.

Legend:

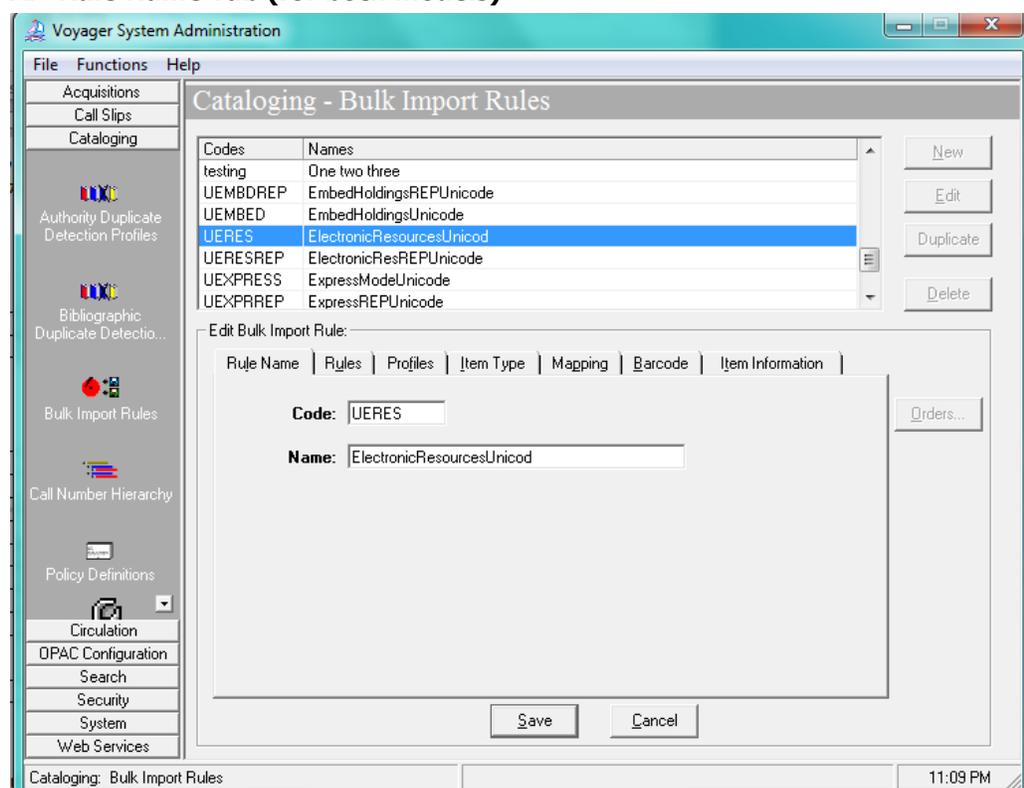
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## Electronic Resources Mode for Unicode

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its OCLC transaction data entry requirements.

*NOTE: For this rule, libraries have the option of mapping the location information from the 049 \$a (similar to the Express Mode model) or from the 852 \$b (similar to the Embedded Holdings Mode model). This decision on which model to use is made by the local library and should take into consideration the library's 049 \$a profile with OCLC, whether call number prefixes, special call numbers, or no call number, are needed in the MFHDs created by bulk import for electronic resources. In the description of the Rules and Mapping tabs below, the both an Express Mode model and Embedded Holdings Mode model are included.*

### A. Rule Name Tab (for both models)



*Cataloging- Bulk Import Rules – Rule Name Tab*

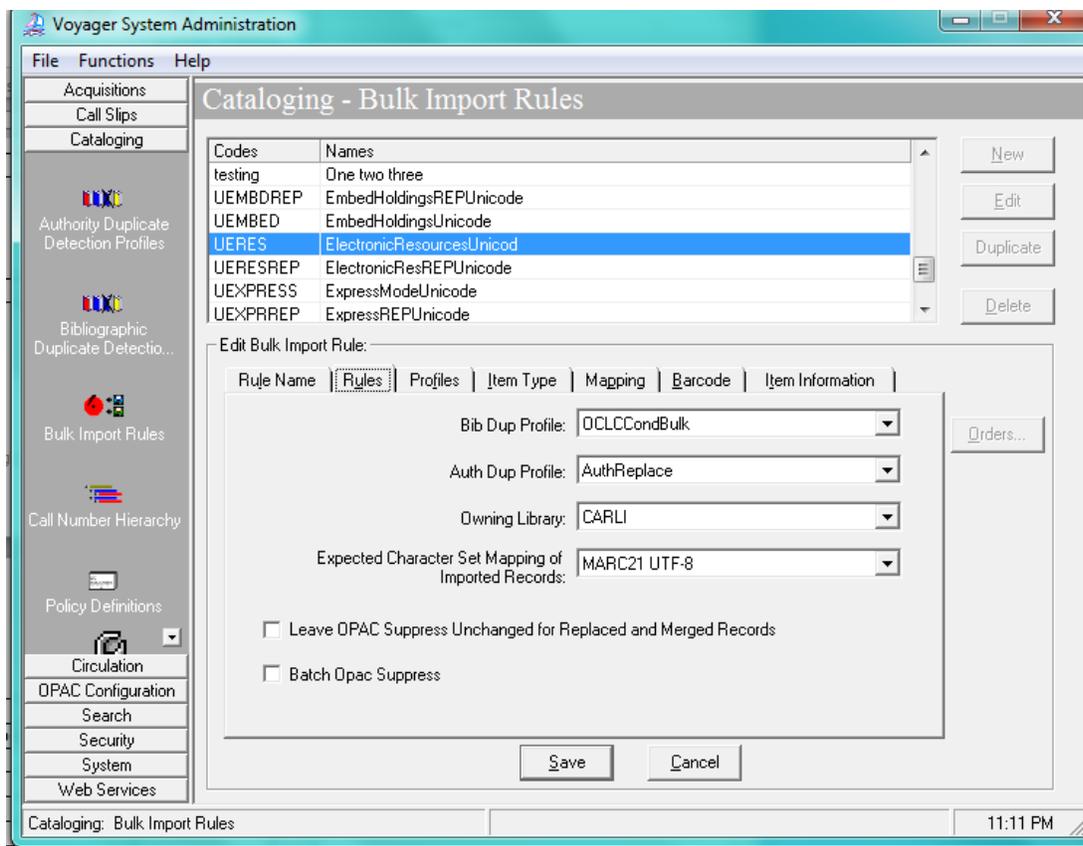
Enter the following data:

<b>Code (case sensitive)</b>	<b>UERES</b>
<b>Name (case sensitive)</b>	<b>ElectronicResourcesUnicode</b>

### B. Rules Tab:

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging- Bulk Import Rules – Rules Tab*

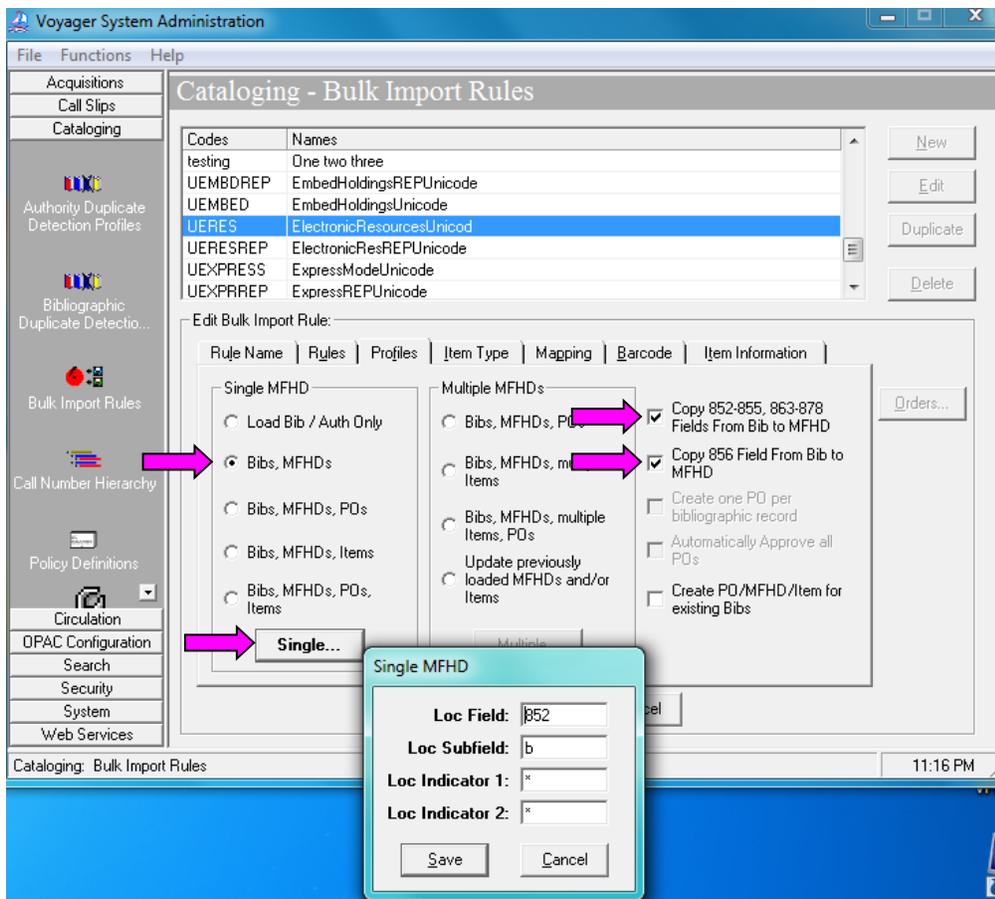
Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 UTF-8</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

### C. Profiles Tab (Embedded Holdings model):

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



*Cataloging- Bulk Import Rules – Profiles Tab*

1. Click [Bibs, MFHDs]
2. Select the following:

<input checked="" type="checkbox"/> <b>Copy 852-855, 863-878 Fields From Bib to MFHD:</b>	<b>MUST be checked.</b>
<input checked="" type="checkbox"/> <b>Copy 856 Field From Bib to MFHD:</b>	<b>MUST be checked.</b>

See section VI.B above for a description of the "Create PO/MFHD/Item for existing Bibs" option.

3. Click [Single...] to open the Single MFHD window

Enter the following data:

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<b>852</b>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<b>b</b>
<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	<b>*</b>
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	<b>*</b>

4. Click [Save] to save the Single MFHD window settings.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

See the *Voyager 9.1.1 System Administration User's Guide*, page 4-46 for a general description of these options.

**D. Profiles Tab (Express Mode model):**

1. Click [Bibs, MFHDs]
2. Select the following:

<input checked="" type="checkbox"/> <b>Copy 852-855, 863-878 Fields From Bib to MFHD:</b>	<b>MUST be checked.</b>
<input checked="" type="checkbox"/> <b>Copy 856 Field From Bib to MFHD:</b>	<b>MUST be checked.</b>

See section VI.B above for a description of the "Create PO/MFHD/Item for existing Bibs" option.

3. Click [Single...] to open the Single MFHD window

Enter the following data:

<input checked="" type="checkbox"/> <b>Loc Field:</b>	<b>049</b>
<input checked="" type="checkbox"/> <b>Loc Subfield:</b>	<b>a</b>
<input checked="" type="checkbox"/> <b>Loc Indicator 1:</b>	<b>*</b>
<input checked="" type="checkbox"/> <b>Loc Indicator 2:</b>	<b>*</b>

4. Click [Save] to save the Single MFHD window settings.

See the *Voyager 9.1.1 System Administration User's Guide*, page 4-46 for a general description of these options.

**E. Item Type Tab (for both models):**

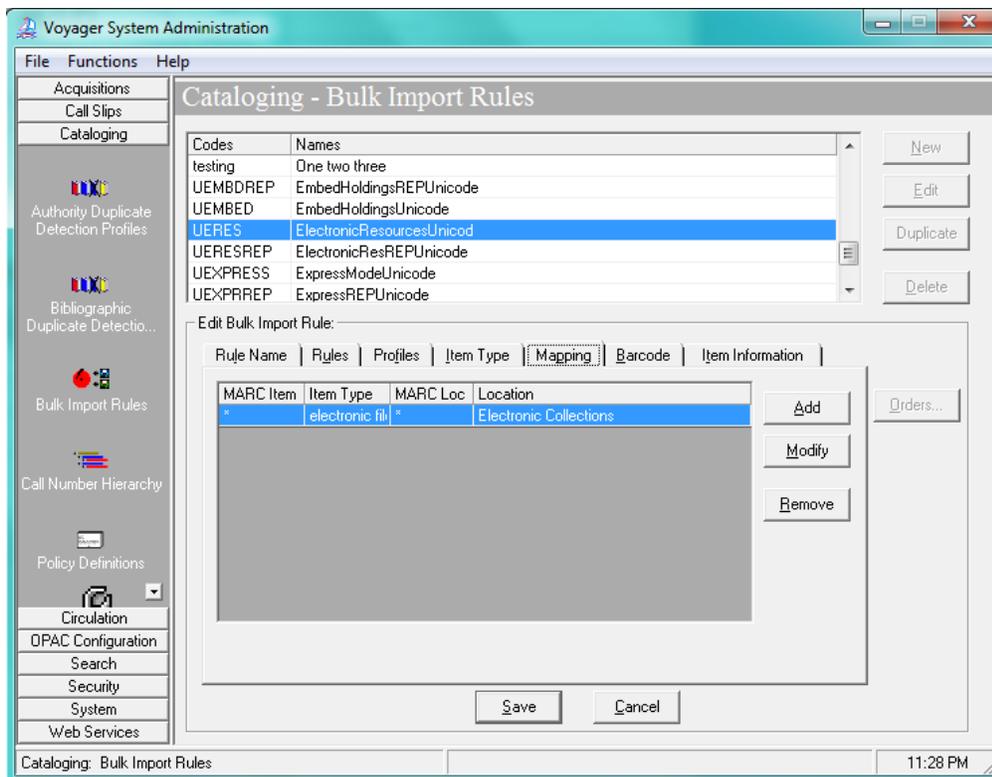
In Electronic Resources Mode, no item records are to be created, so nothing should be entered on this tab.

Do not click [Add] on this screen. Instead, click on the Mapping tab to continue editing this bulk import rule.

**F. Mapping Tab (Embedded Holdings model)**

Legend:

- Consortial Rule for setting value(s)
- CARLI Recommendation for setting value(s)
- Does not apply; Or, Do not change this value



*Cataloging- Bulk Import Rules – Mapping Tab*

In this area, you will enter all of the Voyager location codes (852 \$b) that your library will use for Electronic Resources Mode. Since this bulk import rule is designed to not create item records at all, the asterisk is entered in place of an item type abbreviation in this Mapping table.

1. Click [Add].
2. Enter the appropriate values for your library.
3. Click [OK].
4. If additional mappings are needed, click [Add] again and enter the mapping data; repeat until all combinations of Voyager location codes that match your library's electronic resources cataloging policies are accounted for in this rule.

Enter the following data:

<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<p><b>Enter an asterisk in this field.</b></p> <p>This rule is not designed to create item records, but the OK button is not activated until some data is entered in each field on this screen.</p>
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<p><b>Enter the Voyager location <u>code</u> that staff will enter in the bib record's 852 \$b, to be copied into the MFHD.</b></p>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<b>Select an appropriate Voyager item type from the drop down list.</b>  This rule is not designed to create item records, but the OK button is not activated until some data is entered in each field on this screen.
<input checked="" type="checkbox"/> <b>Voyager Location:</b>	<b>Enter the Voyager location <u>name</u> to which the Voyager location code should map.</b>  Libraries may want to consult the decisions made in their ABBA tables for the MFHD/item record conversion to Voyager, to enter consistent mappings here.
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<b>Select the appropriate call number hierarchy for this mapping.</b>

*Cataloging- Bulk Import Rules – Mapping Tab Settings dialog box*

Here is an **example of a very simple mapping table.**

Do not simply duplicate this example; create a mapping table that suits your collection.

If the library uses only a single Voyager location code for all electronic resources cataloged, an alternative for the Electronic Resources Mapping table is for it to contain only a single row/entry, with asterisks in both the MARC Item Type and MARC Location code fields, and the Voyager Location field populated with the library's single e-resource location code.

MARC Item Type	Voyager Item Type	MARC Loc Code	Voyager Location	Call No. Hierarchy
*	Electrnic1	Online	Online Resou	LC
*	Electrnic1	Onlinedocs	Online GovDo	SuDoc

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

*	Error	*	Error	LC
---	-------	---	-------	----

⊕ **NOTE: Libraries must add a final row to their mapping that is used as the default values to catch any transactions that fall through the cracks. This row must be the final row, anything below it will not be read.**

Enter the following data:

<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<p><b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b></p> <p>A suggestion is to use the same values your library used in the "review row" of your ABBA table in the conversion to Voyager.</p>
<input checked="" type="checkbox"/> <b>Voyager Location:</b>	<p><b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b></p> <p>A suggestion is to use the same values your library used in the "review row" of your ABBA table in the conversion to Voyager.</p>
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<b>Enter the appropriate call number hierarchy</b>

If the library uses only a single Voyager location code for all electronic resources cataloged, an alternative for the Electronic Resources Mapping table is for it to contain only a single row/entry, with asterisks in both the MARC Item Type and MARC Location code fields, and the Voyager Location field populated with the library's single e-resource location code.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

### *Cataloging- Bulk Import Rules – Mapping Tab Settings dialog box*

After all mapping is complete, click on the Save button. Since the Electronic Resources Mode bulk import rule does not create item records, no data entry is needed on the Barcode or Item Information tabs.

**NOTE: If the Save button is grayed out, this usually means that the Mapping tab doesn't have a final entry with asterisks in both the MARC item and MARC Loc fields. Go back to the Mapping tab and add this required field, and try to save the bulk import rule again.**

#### **G. Mapping Tab (Express Mode Model)**

In this area, you will enter all of the OCLC holding codes (049 \$a) that your library will use for Electronic Resources Mode. Since this bulk import rule is designed to not create item records at all, the asterisk is entered in place of an item type abbreviation in this Mapping table.

1. Click [Add].
2. Enter the appropriate values for your library.
3. Click [OK].
4. If additional mappings are needed, click [Add] again and enter the mapping data; repeat until all combinations of Voyager location codes that match your library's electronic resources cataloging policies are accounted for in this rule.

#### Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Description:

<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<b>Enter an asterisk in this field.</b>  This rule is not designed to create item records, but the OK button is not activated until some data is entered in each field on this screen.
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<b>Enter the 4-character OCLC holding code symbol from the 049 \$a.</b>
<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<b>Select an appropriate Voyager item type from the drop down list.</b>  This rule is not designed to create item records, but the OK button is not activated until some data is entered in each field on this screen.
<input checked="" type="checkbox"/> <b>Voyager Location:</b>	<b>Enter the Voyager location <u>name</u> to which the 049 \$a data should map.</b>  Libraries may want to consult the decisions made in their ABBA tables for the MFHD/item record conversion to Voyager, to enter consistent mappings here.
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<b>Select the appropriate call number hierarchy for this mapping.</b>

The screenshot shows a dialog box titled "Cataloging Bulk Import Mapping Settings". It contains five input fields, each with a label and a value:

- MARC Item Type:** \*
- MARC Location Code:** ABCE
- Voyager Item Type:** electronic file (selected from a dropdown menu)
- Voyager Location:** Electronic Collections (selected from a dropdown menu)
- Call Number Hierarchy:** Other (selected from a dropdown menu)

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

*Cataloging- Bulk Import Rules – Mapping Tab Settings Workspace*

Here is an **example of a very simple mapping table**. Do not simply duplicate this example; create a mapping table that suits your collection.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

If the library uses only a single Voyager location code for all electronic resources cataloged, an alternative for the Electronic Resources Mapping table is for it to contain only a single row/entry, with asterisks in both the MARC Item Type and MARC Location code fields, and the Voyager Location field populated with the library's single e-resource location code.

MARC Item Type	Voyager Item Type	MARC Loc Code	Voyager Location	Call No. Hierarchy
*	Electronic1	ABCE	Online Resou	LC
*	Electronic1	ABCG	Online GovDo	SuDoc
*	Error	*	Error	LC

⊕ **NOTE: Libraries must add a final row to their mapping that is used as the default values to catch any transactions that fall through the cracks. This row must be the final row, anything below it will not be read.**

Enter the following data:

<input checked="" type="checkbox"/> <b>MARC Item Type:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>MARC Location Code:</b>	<b>Enter a single asterisk in each field to indicate a wildcard default.</b>
<input checked="" type="checkbox"/> <b>Voyager Item Type:</b>	<p><b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b></p> <p>A suggestion is to use the same values your library used in the "review row" of your ABBA table in the conversion to Voyager.</p>
<input checked="" type="checkbox"/> <b>Voyager Location:</b>	<p><b>Select an appropriate Voyager item type and Voyager location to which these fields should map.</b></p> <p>A suggestion is to use the same values your library used in the "review row" of your ABBA table in the conversion to Voyager.</p>
<input checked="" type="checkbox"/> <b>Call Number Hierarchy:</b>	<b>Enter the appropriate call number hierarchy</b>

If the library uses only a single Voyager location code for all electronic resources cataloged, an alternative for the Electronic Resources Mapping table is for it to contain only a single row/entry, with asterisks in both the MARC Item Type and MARC Location code fields, and the Voyager Location field populated with the library's single e-resource location code.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

*Cataloging- Bulk Import Rules – Mapping Tab Settings dialog box*

After all mapping is complete, click on the Save button. Since the Electronic Resources Mode bulk import rule does not create item records, no data entry is needed on the Barcode or Item Information tabs.

**NOTE: If the Save button is grayed out, this usually means that the Mapping tab doesn't have a final entry with asterisks in both the MARC item and MARC Loc fields. Go back to the Mapping tab and add this required field, and try to save the bulk import rule again.**

The process is completed for the Electronic Resources Mode for Unicode bulk import rule.

## **Electronic Resources Mode (to implement at a future date)**

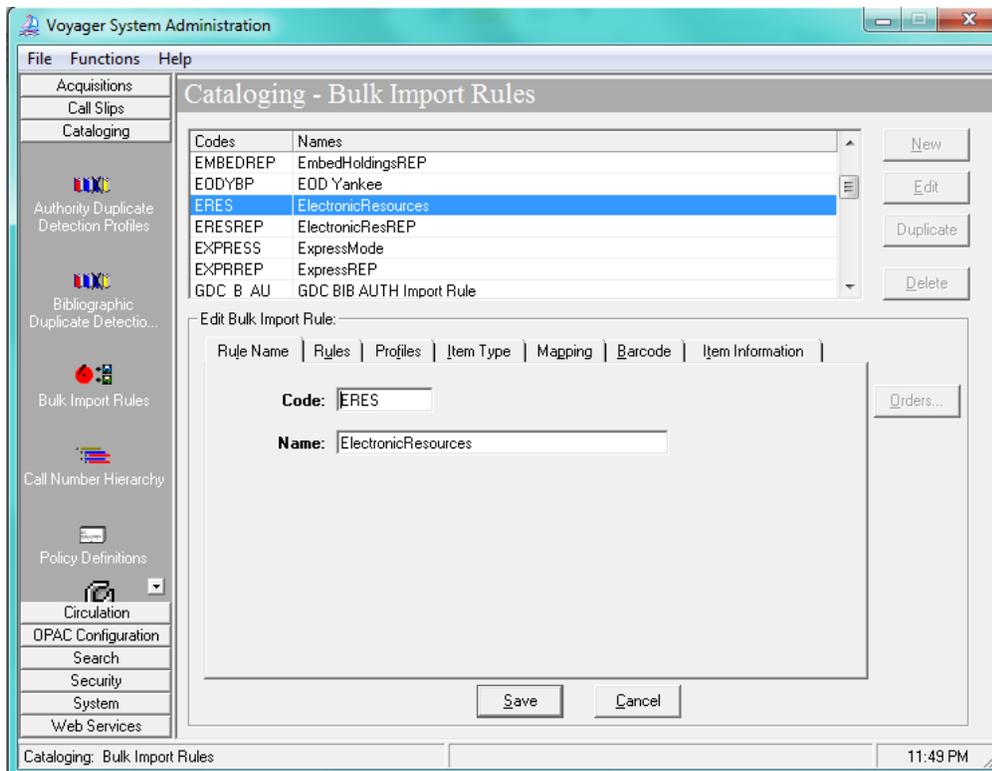
See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its OCLC transaction data entry requirements.

*NOTE: For this rule, libraries have the option of mapping the location information from the 049 \$a (similar to the Express Mode model) or from the 852 \$b (similar to the Embedded Holdings Mode model). This decision on which model to use is made by the local library and should take into consideration the library's 049 \$a profile with OCLC, whether call number prefixes, special call numbers, or no call number, are needed in the MFHDs created by bulk import for electronic resources. In the description of the Rules and Mapping tabs below, the both an Express Mode model and Embedded Holdings Mode model are included.*

### **A. Rule Name Tab (for both models)**

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value



*Cataloging- Bulk Import Rules – Rule Name Tab*

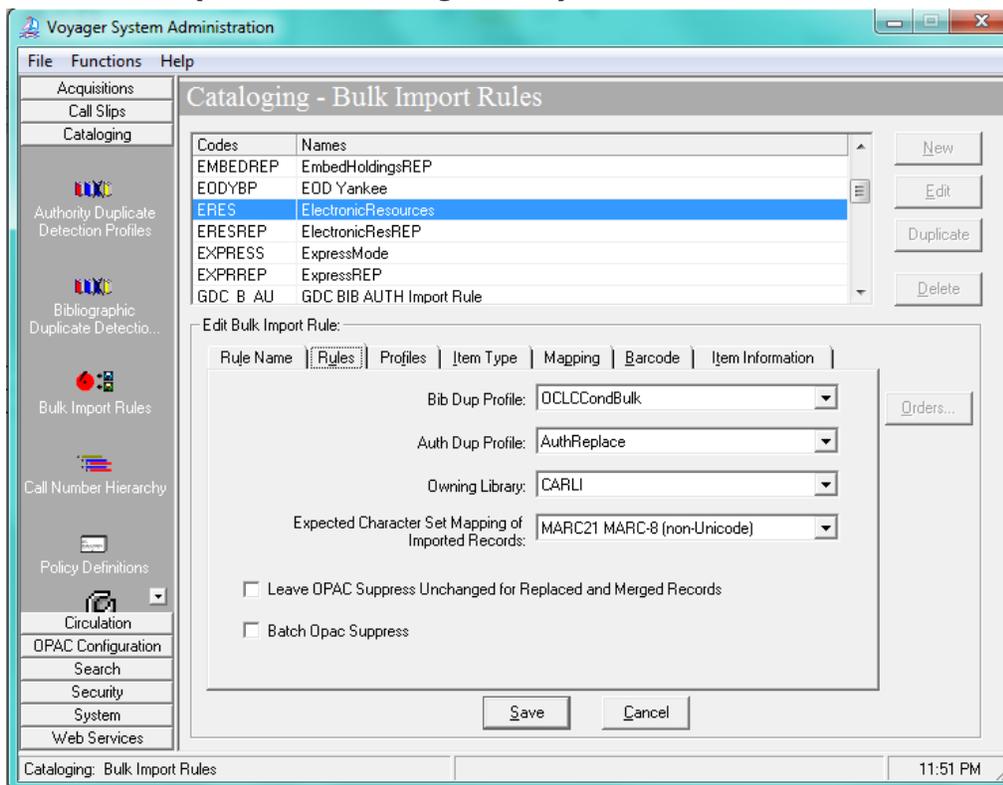
Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>ERES</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>ElectronicResources</b>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

## B. Rules Tab (Embedded Holdings model):



*Cataloging- Bulk Import Rules – Rules Tab*

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCCondBulk</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Expected Character Set Mapping:</b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

## C-G.

Enter the remaining settings for the Profiles and Mapping tabs as described in sections C-G of the Electronic Resources Mode for Unicode bulk import rule, above.

## Electronic Resources Replace Mode for Unicode

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its OCLC transaction data entry requirements.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

NOTE: For this rule, libraries have the option of mapping the location information from the 049 \$a (similar to the Express Mode model) or from the 852 \$b (similar to the Embedded Holdings Mode model). This decision on which model to use is made by the local library and should take into consideration the library's 049 \$a profile with OCLC, whether call number prefixes, special call numbers, or no call number, are needed in the MFHDs created by bulk import. In the description of the Profiles and Mapping tabs above, both an Express Mode model and Embedded Holdings Mode model are included.

**A. Rule Name Tab (for both models)**

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>UERESREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>ElectronicResREPUncode</b>

**B. Rules Tab (for both models):**

Enter the following data:

<input checked="" type="checkbox"/> <b>Bib Dup Profile:</b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b>Auth Dup Profile:</b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b>Owning Library:</b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b>Leave OPAC Suppress Unchanged for Replaced and Merged Records</b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b>Batch Opac Suppress</b>	leave deselected

**C-G.**

Enter the remaining settings for the Profiles and Mapping tabs as described in sections C-G of the Electronic Resources Mode for Unicode bulk import rule, above.

**Electronic Resources Replace Mode (to implement at a future date)**

See the *Using OCLC for Batch Loading Records into I-Share Databases* document for a description of this mode's intended use and its OCLC transaction data entry requirements.

NOTE: For this rule, libraries have the option of mapping the location information from the 049 \$a (similar to the Express Mode model) or from the 852 \$b (similar to the Embedded Holdings Mode model). This decision on which model to use is made by the local library and should take into consideration the library's 049 \$a profile with OCLC, whether call number prefixes, special call numbers, or no call number, are needed in the MFHDs created by bulk import. In the description of the Profiles and Mapping tabs above, both an Express Mode model and Embedded Holdings Mode model are included.

**A. Rule Name Tab (for both models)**

Enter the following data:

<input checked="" type="checkbox"/> <b>Code (case sensitive):</b>	<b>ERESREP</b>
<input checked="" type="checkbox"/> <b>Name (case sensitive):</b>	<b>ElectronicResREP</b>

**B. Rules Tab (for both models):**

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Enter the following data:

<input checked="" type="checkbox"/> <b><i>Bib Dup Profile:</i></b>	<b>OCLCReplace</b>
<input checked="" type="checkbox"/> <b><i>Auth Dup Profile:</i></b>	<b>AuthReplace</b>
<input checked="" type="checkbox"/> <b><i>Owning Library:</i></b>	select your library's Owning Library code
<input checked="" type="checkbox"/> <b><i>Expected Character Set Mapping:</i></b>	<b>MARC21 MARC-8 (non-Unicode)</b>
<input checked="" type="checkbox"/> <b><i>Leave OPAC Suppress Unchanged for Replaced and Merged Records</i></b>	typically leave deselected, note VI.A. above.
<input checked="" type="checkbox"/> <b><i>Batch Opac Suppress</i></b>	leave deselected

**C-G.**

Enter the remaining settings for the Profiles and Mapping tabs as described in sections C-G of the Electronic Resources Mode for Unicode bulk import rule, above.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## VII. Item Type Abbreviations

This chart lists the valid Voyager item type code abbreviations for use in any of the modes that create item records. The abbreviated codes below are to be used for data entry in the MARC Item Type field, which corresponds to the 049 \$I <the letter EL, not the number 1>. These codes are case sensitive, so be careful to enter them as listed below in the bulk import rule's Mapping table.

The Item type names listed below are the generic I-Share names; some I-Share libraries have changed the item type names within their Voyager database, so the Item type names below may not apply to all libraries.

MARC Item Type	Voyager Item Type Name	MARC Item Type	Voyager Item Type Name	MARC Item Type	Voyager Item Type Name
bk1	Book1	Vidlr	VideoLR	res5	Reserve5
bk2	Book2	mic1	Micro1	res6	Reserve6
bk3	Book3	mic2	Micro2	res7	Reserve7
Bkn	BookN	mic3	Micro3	res8	Reserve8
Bkre	BookRE	Micn	MicroN	resn	ReserveN
Bklr	BookLR	Micre	MicroRE	rea1	Realia1
ser1	Serial1	Miclr	MicroLR	rea2	Realia2
ser2	Serial2	sco1	Score1	rea3	Realia3
ser3	Serial3	sco2	Score2	rean	RealiaN
Sern	SerialN	sco3	Score3	reare	RealiaRE
Serre	SerialRE	Scon	ScoreN	realr	RealiaLR
Serlr	SerialLR	Score	ScoreRE	arc1	Archive1
av1	AV1	Scolr	ScoreLR	arc2	Archive2
av2	AV2	map1	Map1	arc3	Archive3
av3	AV3	map2	Map2	arcn	ArchiveN
Avn	AVN	map3	Map3	arcre	ArchiveRE
Avre	AVRE	Mapn	MapN	arclr	ArchiveLR
Avlr	AVLR	Mapre	MapRE	ele1	Electrnic1
rec1	Recording1	Maplr	MapLR	ele2	Electrnic2
rec2	Recording2	sof1	Software1	oth1	Other1
rec3	Recording3	sof2	Software2	oth2	Other2
Recn	RecordingN	sof3	Software3	oth3	Other3
Recre	RecordingRE	Sofn	SoftwareN	othn	OtherN
Reclr	RecordingLR	Sofre	SoftwareRE	othre	OtherRE
vid1	Video1	Soflr	SoftwareLR	othlr	OtherLR
vid2	Video2	res1	Reserve1	err	Error
vid3	Video3	res2	Reserve2		
Vidn	VideoN	res3	Reserve3		
Vidre	VideoRE	res4	Reserve4		

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## VIII. RDA Toolkit

For institutions who subscribe to RDA Toolkit online, configure these settings to turn on RDA Toolkit features within the Voyager Cataloging Client and automate RDA Toolkit authentication.

### A. Enable RDA Toolkit Links

The screenshot shows the 'Cataloging - RDA Toolkit' configuration window. On the left is a sidebar with navigation options: Acquisitions, Call Slips, Cataloging, Bibliographic Duplicate Detectio..., Bulk Import Rules, Call Number Hierarchy, Policy Definitions, and RDA Toolkit. The main window title is 'Cataloging - RDA Toolkit'. Below the title is a section titled 'Edit RDA Toolkit Options'. Inside this section, there is a checkbox labeled 'Enable RDA Toolkit Links' which is checked. A pink arrow points to this checkbox. Below the checkbox are three input fields: 'Username:', 'Password:', and 'Base URL:'. The 'Base URL' field contains the text 'http://access.rdatoolkit.org/?encode=marc&rec='. Below these fields is a note: 'Leave Username and Password blank if you use IP authentication or if your Cataloging operators have their own username/password.' At the bottom of the window are two buttons: 'Save' and 'Cancel'.

*System Administration module - Cataloging – RDA Toolkit*

#### Select the checkbox "Enable RDA Toolkit Links".

This will turn on the RDA Toolkit links feature in the Cataloging client.

### B. Institution-Level user name and password

#### Enter Username and Password if your library has an institution-level username and password for your RDA Toolkit access.

This will allow institution-level authentication to happen for your catalogers using RDA Toolkit links within the Voyager Cataloging client.

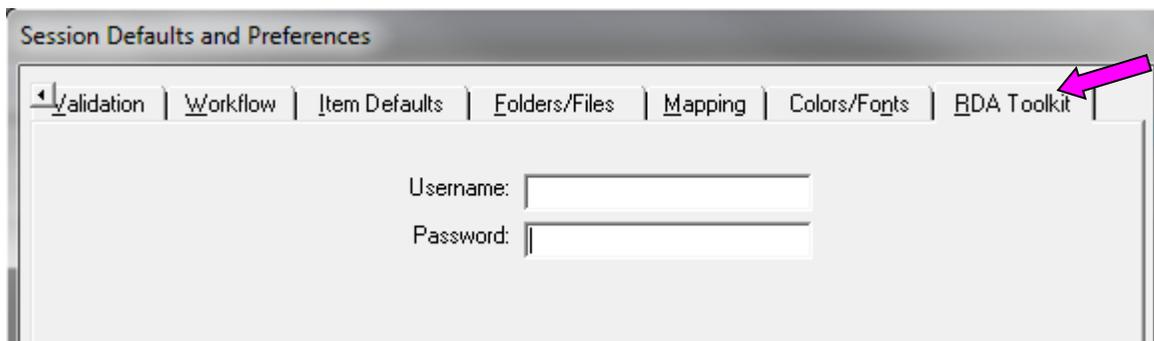
#### Leave Username and Password blank if:

- your institution has IP authentication or
- your institution set up individual user-level access.

Legend:

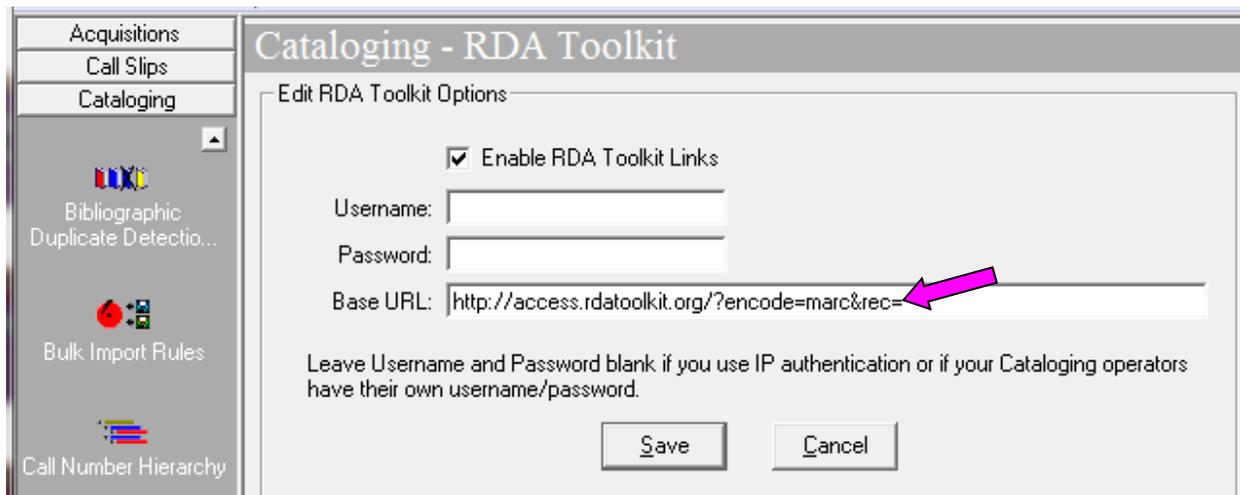
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

When Username and Password are left blank, an RDA Toolkit tab will appear in the Cataloging client under Options – Preferences (Session Defaults and Preferences) so the individual cataloger can set up a specific Username and Password.



*Cataloging module – Options – Session Defaults and Preferences – RDA Toolkit*

### C. Base URL



*System Administration module - Cataloging – RDA Toolkit*

Base URL represents the fixed portion of the RDA Toolkit URL. This required value is automatically supplied by Voyager. The variable portion of the URL is later system supplied based on the position of a cataloger's cursor in a MARC bibliographic or authority record in the Cataloging client when the Edit - Show RDA Toolkit feature is selected.

**Click [Save] to save your RDA Toolkit changes.**

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value