Voyager System Administration in I-Share Libraries

PART 6: CATALOGING



Cataloging System Administration Workspace

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

Table of Contents

I.	Introduction				
II.	Authority Duplicate Detection Profiles				
A.	Profile Tab 4				
В.	Field Definitions Tab 5				
C.	Quality Hierarchy Tab 6				
III.	Bibliographic Duplicate Detection Profiles				
A.	Profile Tab 7				
В.	Field Definitions Tab 8				
C.	Quality Hierarchy Tab (OCLCReplace Profile only) 8				
D.	Three Bibliographic Duplicate Detection Profiles to Add				
IV.	Call Number Hierarchy				
A.	Hierarchy Tab 12				
B.	Call Number Tab 13				
V.	Cataloging Policy Definitions				
A.	Policy Name 16				
B.	Locations Tab 17				
C.	Default Policies Tab 19				
D.	Duplicate Detection Tab 20				
VI.	Bulk Import Rules				
A.	No Holdings Mode for Unicode 23				
В.	No Holdings Mode (implement at a future date) 26				
C.	No Holdings Replace Mode for Unicode 29				
D.	No Holdings Replace Mode (implement at a future date) 30				
E.	Express Mode for Unicode 31				
F.	Express Mode (implement at a future date) 41				
G.	Express Replace Mode for Unicode 42				
Н.	Express Replace Mode (implement at a future date) 43				
I.	Embedded Holdings Mode for Unicode 44				
J.	Embedded Holdings Mode (implement at a future date) 55				
К.	Embedded Holdings Replace Mode for Unicode 56				
L.	Embedded Holdings Replace Mode (implement at a future date) 57				
М.	Electronic Resources Mode for Unicode 58				
N.	Electronic Resources Mode (implement at a future date) 68				
0.	Electronic Resources Replace Mode for Unicode 70				
Ρ.	Electronic Resources Replace Mode (to be implemented at a future date) 71				
VII.	Item Type Abbreviations				
VIII.	RDA Toolkit74				

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

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
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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)

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

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

A. Profile Tab

Voyager System Administration				
File Functions Help				
Acquisitions Cataloging - Authority Duplicate Detection Profiles				
Codes Names	New			
AUTHREP AuthReplace				
Autorio Dustante	Edit			
Authority Duplicate Detection Profiles				
	Delete			
Bibliographic Edit Authority Duplicate Detection Profile:				
Duplicate Detectio Profile Field Definitions Quality Hierarchy				
Profile Name: AuthReplace Profile Code: AUTHREP				
Bulk Import Hules				
C Add-Unconditional (• Replace C Add-Conditional C Merge				
Discard incoming records that do not match existing records	Discard incoming records that do not match existing records			
Policy Definitions (None O DCLC O RLIN				
Circulation				
OPAC Configuration Duplicate Replace: 100	_ Duplicate Replace: 100 🗄 Duplicate Warn: 25 🖶			
Search				
Svstem Svstem				
Cataloging: Authority Duplicate Detection Profiles	1:27 PM 🔒 🏿			

Cataloging – Authority Duplicate Detection Profile- Profile Tab

Enter the following data:

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

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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 <u>not</u> 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.

🐊 Voyager System A	Administration	x
File Functions H	elp	
Acquisitions	Cataloging - Authority Duplicate Detection Profiles	
Call Slips	Catalognig - Authonity Duplicate Detection Fromes	
Cataloging	Codes Names New	
	AUTHREP AuthReplace	
	BULKLC BulkLC Edit	
Authority Duplicate		
Detection Profiles	Delate	
Bibliographic	Edit Authority Duplicate Detection Profile:	
Duplicate Detectio	Profile Field Definitions Quality Hierarchy	
	Code Auvilable Indexes Field Subfield	
	A10A Auth LCCN (010a) A350 Auth System Number	
Bulk Import Rules	A10Z Auth LCCN (010z) ATID Authority Record Id	
	A350 Auth System Number for de-(A10A Auth LCCN (010a)	
	A35A Auth System Number (035a) A10Z Auth LCCN (010z)	
Call Number Hierarchy	A35Z Auth System Number (035z):	
,	ATID Authority Record Id	
_	•	
<u>her</u>		
Policy Definitions		
Circulation		
OPAC Configuration	Field Override: Sub Field Override: Field Weight: 100 🖯	
Search		
Security	Current Current	
System	<u>Save</u> <u>Lance</u>	
Cataloging: Authority D	uplicate Detection Profiles 1:33 PM	

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.

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

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.

- ⊕ Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing 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.

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

A. Profile Tab

🐊 Voyager System A	dministration	
File Functions He	elp	
Acquisitions	Cataloging - Bibliographic Duplicate Detection Profiles	
Call Slips	Cataloging Dionographic Duplicate Detection Promes	
Cataloging	Codes Names	New
	OCLCCON OCLCConditional	<u> </u>
LIX	OCLCCONB OCLCCondBulk	<u>E</u> dit
Authority Duplicate	OCLCREP OCLCReplace	
Detection Profiles		<u>D</u> elete
NIX C		
Bibliographic	Edit Bibliographic Duplicate Detection Profile:	
Duplicate Detectio	Profile Field Definitions	
	Profile Name: OCLCConditional Profile Code: OCLCCON	-
Bulk Import Rules		
	Duplicate Handling:	1
1 7	C Add-Unconditional C Replace 💿 Add-Conditional C Merge C Bi-Directional Merge	
Call Number Hierarchy	Discord incoming records that do not match quisting records	
	Discard incoming records that do not match existing records	
in the second	Cancellation:	1
Policy Definitions	○ None	
Circulation	Durfacts Darlage 100 12 Durfacts Mars 10 12	
OPAC Configuration	Duplicate Replace: 100 🕞 Duplicate warn: 10 🕞	
Search		
Security	Save	
System		
Cataloging: Bibliographi	ic Duplicate Detection Profiles 5:	53 PM 🛛 🔒 🏑

Cataloging – Bibliographic Duplicate Detection Profile – Profile Tab

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

B. Field Definitions Tab

🐊 Voyager System A	dministration								
File Functions He	elp								
Acquisitions Call Slips	Catalogi	ng - Bibliograpl	nic I	Duplica	ate De	tection Profi	les		
Cataloging	Codes	Names							New
	OCLCCON	OCLCConditional							
LIX:	OCLCCONB	OCLCCondBulk							<u>E</u> dit
Authority Duplicate	OCLCREP	OCLCReplace							
Detection Profiles									<u>D</u> elete
NIX C									
Bibliographic Duplicate Detectio	Edit Bibliogr	aphic Duplicate Detection F Field Definitions	Profile:						
• •	Code	Available Indexes			Code	Selected Indexes	Field	Subfield	
₩ • ≣	035A	System Number (035a)		N (0354	System Number	019	a	
Bulk Import Hules	035Z	System Number (035z): Cancelled/Invalid		<u>>></u>	010A	(035a) LCCN (010a)	010		
·	074A	GPO Item Number (074a)			022A	ISSN (022a)			-
Call Number Hierarchy	074Z	GPO Item Number (074z): Cancelled/Invid			0241	ISBN-13 (024a) Bublisher Number			
	100H	Personal Name		<	028A	(028a)			
	110H	Corporate Name		~~	0250	System Number for			
Policy Definitions	111H	Conference	-		0350	de-duping (035a)			-
					·				
Circulation	Field Out	arrida 019 Su	ıb Field	Querride		Field \u	ojaht 10		
OPAC Configuration	Field O W	sinde j'ors su		ovenide	a		eigni [To		
Search									
Security				Caulo	Car	nool			
System				<u>o</u> ave	Lar	ncer			
Cataloging: Bibliographi	ic Duplicate Dete	ection Profiles						6:03 l	РМ 🔒

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, <u>be sure to double check the field weight values for each field</u>, 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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ 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:

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

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:

⊕ <i>010A</i>	Field Weight: 10
⊕ <i>022A</i>	Field Weight: 10
⊕ 024I	Field Weight: 10
⊕ <i>028A</i>	Field Weight: 10
⊕ <i>0350</i>	Field Weight: 100
⊕ 035A	Field Weight: 100, field override = 019, subfield
	override = a
+ BBID	Field Weight: 100
⊕ I SB3	Field Weight: 10

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

Profile #2 – OCLC Replace

A. Profile Tab

Enter the following data:

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

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 <u>not</u> match an existing record in the database are <u>not</u> 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

Field Weight: 10
Field Weight: 10
Field Weight: 10
Field Weight: 10
Field Weight: 100
Field Weight: 100, field override = 019, subfield
Field Weight: 100
Field Weight: 10

Enter the following data:

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

Profile #3 – OCLC Conditional Bulk

A. Profile Tab

Enter the following data:

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

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

Entor the following date

- ⊕ Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing 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

🔔 Voyager System	Administration	
<u>File Functions H</u> elp		
Acquisitions	Cataloging - Call Number Hierarchy	
Call Slips		
Cataloging	Codes Names	New
	Dewey Dewey	<u>II</u> OW
LUXD	LC Library of Congress	Edit
Authority Duplicate	NLM NLM	
Detection Profiles	Other Other	Delete
	USDOC USDoc	<u>E</u> 0000
LOXO		
Bibliographic	Edit Call Number Hierarchy:	
Duplicate Detectio	Hierarchy Call Number	
<u>●</u> :≣	Code: [
Bulk Import Rules		
	Name: Library of Congress	
1 - E - E - E - E - E - E - E - E - E -		
Call Number Hierarchy	Lall Number Type: Library of Longress	
	✓ Use as Default	
Policy Definitions		
Circulation	<u>Save</u> <u>Cancel</u>	
OPAC Configuration		
Search		
Security		
System		
Cataloging: Call Numbe	r Hierarchy	2:50 PM

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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ 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:

Call Number Type	852 first indicator
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.

🔔 Voyager System	Administratio	n							
<u>File</u> Functions <u>H</u> elp									
Acquisitions	Catalog	ing - (Call Num	ber Hierz	rchv				
Call Slips	Catarog		oun r tain				_		
Cataloging	Codes	Name:	s					New	
	Dewey	Dewe	y					<u></u>	1
IIIX 0	LC	LC						Edit	
Authority Duplicate	SuDoc	SuDoc	5					_	1
Detection Profiles								Dialata	1
								Delete	
INX 1									
Bibliographic	Edit Call Nu	umber Hiera	archy:						1
Duplicate Detectio	<u>H</u> ierarch	ny Call	Number						
		-						1	
<u>(</u> •:≅		Ind1	Ind2	Field	SubFld	Cutter-SubFld	A	dd	
Bulk Import Bules		×	×	050	a	b			
Duik Import Paics	<u> </u>	×	*	090	a	D	<u>M</u>	odify	
	Brieritu	*	*	000	a -				
) i i i i i i i i i i i i i i i i i i i	Filonty			030	a		<u>B</u> er	nove	
Call Number Hierarchy	+								
i									
Policy Definitions									
Circulation				Save		Cancel			
Urculation									
Search									
Security									
System	0			_					
Cataloging: Call Numbe	er Hierarchy							12:13 P	М //.

B. Call Number Tab

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.
 - 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 codec	1.
Cataloging Call Numbe	r Settings
Field: 099	Main Subfield: a
Indicator 1: 🛛	Indicator 2: 💌
Cutter Subfield: a	
<u>0</u> K	Cancel

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.

Edit Call Nun <u>H</u> ierarchy	nber Hierarch / Call <u>N</u> ur	y: nber				1
	Ind1	Ind2	Field	SubFld	Cutter-SubFld	Add
	×	×	099	a	a	
÷	×	×	099	a		Modify
Priority						<u>H</u> emove
			<u>S</u> ave	. (Qancel	

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

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ 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.

① CARLI strongly recommends that this default policy definition be deleted before the library creates their "real" cataloging policy definitions following the <u>production</u> bib load.



Cataloging – Policy Definitions Workspace

- \oplus Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

A. Policy Name Tab

🔔 Voyager System	Administration	
<u>File Functions H</u> elp		
Acquisitions	Cataloging - Policy Definitions	
Call Slips		
Cataloging	Policy Names	New
	Main Cataloging	
NOX0	Other Branch Cataloging	<u>E</u> dit
Authority Duplicate Detection Profiles		
		Delete
NTV:		
Bibliographic	Edit Policy Definition:	
Duplicate Detectio	Policy Locations Default Policies Duplicate Detection	
	Name: Main Cataloging	
Bulk Import Rules		
1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 -		
Call Number Hierarchy		
Sec.		
Policy Definitions		
Circulation		
Urculation		
Search		
Security	<u>Save</u> <u>Cancel</u>	
System		
Cataloging: Policy Defir	, nitions	2:38 PM

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:

☑ Name:	Make the name meaningful to your library. Can
	be up to 40 characters.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ 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": <u>http://www.carli.illinois.edu/products-services/i-share/sysadmin/secure/addlocations</u>

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:

Available Box:	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.
	Move all appropriate locations for the policy group to the Selected locations using the

① Consortial Rule for setting value(s)

[☑] CARLI Recommendation for setting value(s)

 $[\]oslash$ Does not apply; Or, Do not change this value

	arrow buttons.
Selected Box:	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:	
<i> </i>	Choose the appropriate value for the location.
	Voyager will use the values selected here when the individual staff member does not override these defaults with values in their client preference settings.
⊕ Initial Default Item Type:	Choose the appropriate value for the location.
	Voyager will use the values selected here when the individual staff member does not override these defaults with values in their client preference settings.
Ø Other NUC Code:	Leave the field blank ; there is no functionality based on this value.
Cataloging Location:	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.
	You must have at least one location defined as a cataloging HAPPENING Location for each cataloging policy group.
☑ <i>Routing Location:</i>	If you want the location to be a routing location, check the Routing Location box.
	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:

① Consortial Rule for setting value(s)

- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

C. Default Policies Tab

File Functions Help	
Acquisitions Cataloging - Policy Definitions	
Call Slips Catalog ing - Foncy Definitions	
Cataloging	
	ew
	dit
Authority Duplicate	
Detection Profiles	elete
Bibliographic Edit Policy Definition:	
Duplicate Detection Policy Locations Default Policies Duplicate Detection	
NUC Code: ILCSO	
Bulk Import Rules	
Available Call Number Hierarchies Selected Call Number Hierarchies	
Call University	
Policy Definitions	
Circulation	
OPAC Configuration	
Search Carry Carry	
Security Save Lance	
System	
Cataloging: Policy Definitions	12:16 PM 🏼 🎢

Cataloging- Policy Definitions –Default Policies Tab

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

Enter the following data:

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

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

D. Duplicate Detection Tab

A Voyager System Administration	
File Functions Help	
Acquisitions Cataloging - Policy Definitions	
Call Slips Call Slips	
Cataloging Policy Names	New
Cataloging	
UX0	<u>E</u> dit
Authority Duplicate	
Detection Profiles	Delete
Edit Policy Definition	
Bibliographic Detection Defended Defended Defended Defended Detection	
Aveilable Dis Due Preffer	
Available Bib Dup Profiles Selected Bib Dup Profiles	
Bulk Import Fules	
< OCLCCondBulk	
Call Number Hierarchy	
Available Authority Dup Profiles Selected Authority Dup Profiles	
AuthReplace	
Policy Definitions	
Circulation	
OPAC Configuration	
Search Careel	
Security <u>Security</u>	
System	
Cataloging: Policy Definitions	1:34 PM

Cataloging- Policy Definitions –Duplicate Detection Tab

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

Enter the following data:

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

- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

[⊕] Consortial Rule for setting value(s)

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. Note that these rules do <u>not</u> 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 <u>not</u> 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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

Α.	Rule	Name	Tab

🔔 Voyager System	dministration		– – ×
File Functions H	lp		
Acquisitions	Cataloging - Bulk Import R	lules	
Call Slips	Cataloging - Dulk Import N		
Cataloging	Codes Names		Maur
-	LIEBES ElectronicBesourcesUnicod	^ ^ ^	New
	UERESREP ElectronicResREPUnicode		Edit
Bibliographic	UEXPRESS ExpressModeUnicode		<u></u>
Duplicate Detectio	UEXPRREP ExpressREPUnicode		Duplicate
	UNOHDREP NoHoldingsREPUnicode	-	
<u>6</u> :8	UNOHOLD NoHoldingsUnicode	<u> </u>	Dialata
Bulk Import Bules		•	Delete
Duix import rules	Edit Bulk Import Rule:		
	Bule Name Bules Profiles Litem T	upe Mapping Barcode Litem Information	
· 💻			
Call Number Hierarchy	Code: UNOHOLD		Ordere
	Code. JONOHOLD		
They we	Name: NoHoldingsUnicode		
Policy Definitions			
12			
PDA Toolkit			
NDA LOUIKI			
61 L F			
Search Casurity			
Sustem		Save Cancel	
Web Services			
WED DEIVICES			
Cataloging: Bulk Impo	Rules		1:10 PM

Cataloging- Bulk Import Rules – Rule Name Tab

Enter the following data:

☑ Code (case sensitive):	UNOHOLD
☑Name (case sensitive):	NoHoldingsUnicode

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

B. Rules Tab

🔔 Voyager System A	dministration	 X
File Functions H	elp	
Acquisitions Call Slips	Cataloging - Bulk Import Rules	
Cataloging	Codes Names	New
	UERES ElectronicResourcesUnicod	<u></u>
LUX()	UERESREP ElectronicResREPUnicode	Edit
Authority Duplicate	UEXPRESS ExpressModeUnicode	
Detection Profiles	UEXPRREP ExpressREPUnicode	Duplicate
	UNOHDREP NoHoldingsREPUnicode	
ULX:	UNUHOLD NoHoldingsUnicode	<u>D</u> elete
Bibliographic Duplicate Detectio	Edit Bulk Import Bule:	
Bulk Import Rules Bulk Import Rules Call Number Hierarchy Policy Definitions Circulation OPAC Configuration Search Security Sustem	Rule Name Rules Profiles Item Type Magping Barcode Item Information Bib Dup Profile: OCLCCondBulk Auth Dup Profile: AuthReplace Owning Library: CAPLL Expected Character Set Mapping of Imported Records: MARC21 UTF-8 Leave OPAC Suppress Unchanged for Replaced and Merged Records Batch Opac Suppress Save Cancel Cancel	<u>O</u> rders
Web Services		
Cataloging: Bulk Import	Rules	4:02 PM

Cataloging- Bulk Import Rules – Rules Tab

Enter the	following	data:

☑ Bib Dup Profile:	OCLCCondBulk
Auth Dup Profile:	AuthReplace
✓ Owning Library:	select your library's Owning Library code
Expected Character Set Mapping:	MARC 21 UTF-8
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	leave deselected

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

C. Profiles Tab

(2) Voyager System A	Administration			– – X
File Functions H	elp			
Acquisitions Call Slips	Cataloging - Bulk In	mport Rules		
Cataloging	Codes Names		A	New
Authority Duplicate	UERES ElectronicResou UERESREP ElectronicResRE UEXPRESS ExpressModeUn	rcesUnicod EPUnicode icode		<u>E</u> dit
Detection Profiles	UEXPRREP ExpressREPUnic UNOHDREP NoHoldingsREP	code Unicode		Duplicate
Bibliographic	UNOHOLD NoHoldingsUnic	ode		<u>D</u> elete
Duplicate Detectio	Edit Bulk Import Rule: Rule Name R <u>u</u> les Pro <u>f</u>	iles <u>I</u> tem Type Ma <u>p</u> ping <u>B</u>	arcode Item Information	1
Bulk Import Rules	Single MFHD	Multiple MFHDs Bibs, MFHDs, POs	Copy 852-855, 863-878 Fields From Bib to MFHD	<u>O</u> rders
Call Number Hierarchy	C Bibs, MFHDs	C Bibs, MFHDs, multiple Items	Copy 856 Field From Bib to MFHD	
	C Bibs, MFHDs, POs	C Bibs, MFHDs, multiple Items, POs	Create one PO per bibliographic record	
Policy Definitions	G Bibs, MFHDs, POs, Items	C loaded MFHDs and/or Items	Create PO/MFHD/Item for existing Bibs	
OPAC Configuration Search	Single	e MFHD		
Security System Web Services		Loc Field:	ncel	-
Cataloging: Bulk Import	t Rules	Loc Subfield: Loc Indicator 1: *		9:31 AM
		Loc Indicator 2: 🔹		
		<u>Save</u>		

Cataloging- Bulk Import Rules – Profiles Tab

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

☑ Loc Field:	Blank
✓ Loc Subfield:	Blank
✓Loc Indicator 1:	*
☑ Loc Indicator 2:	*

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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

Δ.	Rule	Name	Tab
~	Nuic	nume	IUD

🐊 Voyager System A	dministration	
File Functions H	elp	
Acquisitions	Cataloging - Bulk Import Rules	
Call Slips	Cutatognig Daix import raito	
Cataloging	Codes Names	▲ New
	NOHLDREP NoHoldingsREP	
LIX.	NOHOLD NoHoldings	Edit
Authority Duplicate	OCLCADDU OCLCUnconditional	
Delection Fromes		Duplicate
	SPRINGER Springer Medicine	
LIXC	test test	<u>D</u> elete
Bibliographic Duplicate Detectio	Edit Bulk Import Rule:	
	Bule Name Bules Brofiles Item Tupe Mapping Barcode Item Information	
<u>6</u> •9	Traje Mane Trajes Trajies jean type Magping Dalcode rjen monnador	
Bulk Import Rules	Code: NOHOLD	Orders
1 11	Name: NoHoldings	
Call Number Hierarchy		
Econ		
Policy Definitions		
a •		
Circulation		
OPAC Configuration		
Search		
Security		
System	<u>S</u> ave <u>C</u> ancel	
Web Services		
Cataloging: Bulk Import	Rules	8:47 AM

Cataloging- Bulk Import Rules – Rule Name Tab

Enter the following data:

✓ Code (case sensitive):	NOHOLD
☑ Name (case sensitive):	NoHoldings

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

B. Rules Tab

🐊 Voyager System A	Idministration	- • ×
File Functions H	elp	
Acquisitions	Cataloging - Bulk Import Bules	
Call Slips	Catalognig - Dark Import Rates	
Cataloging	Codes Names	New
	NOHLDREP NoHoldingsREP	<u></u>
	N0H0LD NoHoldings	<u>E</u> dit
Authority Duplicate	OCLCADDU OCLCUnconditional	
Detection Profiles	OCLCCON OCLCConditional	Duplicate
	UCLUREP UCLUReplace	
LLXD		<u>D</u> elete
Bibliographic	E da Bulle Inconte Dular	
Duplicate Detectio		
	Rule Name Rules Profiles I tem Type Mapping Barcode I tem Information	
•:	Die Dure Durchen DOCI CConstDuille	
Bulk Import Rules		<u>O</u> rders
	Auth Dup Profile: AuthBeplace	
1 78		
Call Number Hierarchy	Owning Library: CARLI	
	Expected Character Set Mapping of MABC21 MABC3 (non-Unicode)	
Engen	Imported Records:	
Policy Definitions		
@ -	Leave OPAC Suppress Unchanged for Replaced and Merged Records	
Circulation	E Patch Open Suppress	
OPAC Configuration	j baich opac suppress	
Search		
Security		
System	<u>Save</u> <u>Cancel</u>	
Web Services		
Cataloging: Bulk Import	Rules	8:57 AM

Cataloging- Bulk Import Rules – Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCCondBulk	
Ø Auth Dup Profile:	AuthReplace	
Ø Owning Library:	select your library's Owning Library code	
☑ Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)	
Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.	
Replaced and Merged Records		
☑ Batch Opac Suppress	leave deselected	

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

☑ Loc Field:	Blank
☑ Loc Subfield:	Blank
<i>⊠Loc Indicator 1:</i>	*
✓Loc Indicator 2:	*

- 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.

- \oplus Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing 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:

☑ Code (case sensitive):	UNOHDREP
☑ Name (case sensitive):	NoHoldingsREPUnicode

B. Rules Tab

Enter the following data:

⊠Bib Dup Profile:	OCLCReplace
☑ Auth Dup Profile:	AuthReplace
☑ Owning Library:	select your library's Owning Library code
Is Expected Character Set Mapping:	MARC 21 UTF-8
I Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	leave deselected

C. Profiles Tab

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

☑ Loc Field:	Blank
☑ Loc Subfield:	Blank
<i>⊠Loc Indicator 1:</i>	*
<i>⊠Loc Indicator 2:</i>	*

- 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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \oslash 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:

☑ Code (case sensitive):	NOHLDREP	
☑ Name (case sensitive):	NoHoldingsREP	

B. Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCReplace
☑ Auth Dup Profile:	AuthReplace
Ø Owning Library:	select your library's Owning Library code
☑ Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	leave deselected

C. Profiles Tab

1. Click [Load Bib/Auth Only].

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

☑ Loc Field:	Blank
☑ Loc Subfield:	Blank
<i>⊠Loc Indicator 1:</i>	*
☑ Loc Indicator 2:	*

- 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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

🐊 Voyager System A	dministration	X
File Functions He	elp	
Acquisitions	Cataloging - Bulk Import Bules	
Call Slips	Catalognig - Daix import Raios	
Cataloging	Codes Names	New
	UERES ElectronicResourcesUnicod	TROW
LIX	UERESREP ElectronicResREPUnicode	Edit
Authority Duplicate	UEXPRESS ExpressModeUnicode	
Detection Profiles	UEXPRREP ExpressREPUnicode	Duplicate
	UNOHDREP NoHoldingsREPUnicode	
LUX C		Delete
Bibliographic		<u></u>
Duplicate Detectio	Edit Bulk Import Rule:	
	Rule Name Rules Profiles I tem Type Mapping Barcode Item Information	
() :8		
Bulk Import Rules	Code: UEXPRESS	Orders
	Name: ExpressModeUnicode	
Call Number Hierarobu		
Call Number Theraicity		
Eager		
Policy Definitions		
6 I		
Circulation		
OPAC Configuration		
Search		
Security		
System	<u>Save</u> <u>Cancel</u>	
Web Services		
Cataloging: Bulk Import	Rules	10:22 AM

A. Rule Name Tab

Cataloging- Bulk Import Rules – Rule Name Tab

Enter the following data:

✓ Code (case sensitive):	UEXPRESS
☑ Name (case sensitive):	ExpressModeUnicode

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

B. Rules Tab

🐊 Voyager System A	dministration	- • ×
File Functions He	łp	
Acquisitions	Cataloging - Bulk Import Rules	
Call Slips	Catalognig - Dulk import Rules	
Cataloging	Codes Names	New
	UERES ElectronicResourcesUnicod	<u> </u>
LLX	UERESREP ElectronicResREPUnicode	<u>E</u> dit
Authority Duplicate	UEXPRESS ExpressModeUnicode	
Detection Profiles		Duplicate
	UNDHDREP NoHoldingsREPUnicode	
LIXC		<u>D</u> elete
Bibliographic Duplicate Detectio	Edit Bulk Import Bule:	
Duplicate Detectio		
• • •	Rule Name Rules Profiles Item Type Mapping Barcode Item Information	
•	Bib Dup Profile: OCLCCondBulk	. 1
Buik Import Rules		Urders
	Auth Dup Profile: AuthReplace	
1 1 1		
Call Number Hierarchy	Uwning Library: LARLI	
	Expected Character Set Mapping of MABC21 UTF-8	
- Engen	Imported Records:	
Policy Definitions	olicy Definitions	
ര ല	Leave UPAC Suppress Unchanged for Replaced and Merged Records	
Circulation	Batch Opac Suppress	
OPAC Configuration		
Search		
Security	Saus Canad	
System		
web services		
Cataloging: Bulk Import	Rules	10:24 AM 🏒

Cataloging- Bulk Import Rules – Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCCondBulk
☑ Auth Dup Profile:	AuthReplace
Ø Owning Library:	select your library's Owning Library code
Expected Character Set Mapping:	MARC21 UTF-8
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	leave deselected

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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:

✓ Copy 852-855, 863-878 Fields From Bib to MFHD:	Recommended to check.
☑ Copy 856 Field From Bib to MFHD:	Recommended to check.

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:

☑ Loc Field:	049
☑ Loc Subfield:	a

Legend:

 \oplus Consortial Rule for setting value(s)

- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

☑ Loc Indicator 1:	*
☑ Loc Indicator 2:	*

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

🐊 Voyager System A	dministration	
File Functions He	elp	
Acquisitions	Cataloging - Bulk Import Rules	
Call Slips	Catalognig - Dark Import Raios	
Cataloging	Codes Names	New
	UERES ElectronicResourcesUnicod	<u></u> om
LUX()	UERESREP ElectronicResREPUnicode	<u>E</u> dit
Authority Duplicate	UEXPRESS ExpressModeUnicode	
Detection Profiles	UEXPRREP ExpressREPUnicode	Duplicate
	UNUHDREP NoHoldingsREPUnicode	
LLXC		<u>D</u> elete
Bibliographic	Edð Bulk Issant Bula	
Duplicate Detectio		
A 17	Rule Name Rules Profiles Item Type Mapping Barcode Item Information	
•:	Indicator 1 Indicator 2 Field Subfield	
Bulk Import Rules	× × 049	<u>O</u> rders
1 78 -	<u>Modity</u>	
Call Number Hierarchy		
	Priority <u>R</u> emove	
Example 1	T	
Policy Definitions		
L21 -		
Search		
Security		
System	<u>Save</u>	
Web Services		
Cataloging: Bulk Import	Rules	10:37 AM

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 fol	lowing data
------------------	-------------

☑ Field:	049
☑ Subfield:	I (that's the letter EL, not the number one)
☑ Indicator 1:	*
☑ Indicator 2:	*

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

Cataloging Bulk Import Item Settings	
Field: 049	Subfield:
Indicator 1: 🛛 🔭	Indicator 2: X
<u>0</u> K	<u>C</u> ancel

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

3. Click [OK].

E. Mapping Tab

🔔 Voyager System	n Administration	- 0 X
File Functions	Help	
Acquisitions	Cataloging - Bulk Import Rules	
Call Slips	Cataloging Dark import Raios	
Cataloging	Codes Names	New
	UERES ElectronicResourcesUnicod	
LUX)	UERESREP ElectronicResREPUnicode	<u>E</u> dit
Authority Duplicate	UEXPRESS ExpressModeUnicode	
Detection Fromes		Duplicate
	UNOHOLD NoHoldings/ncroineode	
LUXC	······································	<u>D</u> elete
Bibliographic Duplicate Detectio	Edit Bulk Import Rule:	
●:≣ Bulk Import Rules	Rule Name Rules Profiles Item Type Mapping Barcode Item Information MARC Item Item Type MARC Loc Location book Main Add	<u>O</u> rders
Call Number Hierarch	Woony Remove	
Policy Definitions		
OPAC Configuration		
Search		
Security		
System	<u>Save</u> <u>Lancel</u>	
Web Services		
Cataloging: Bulk Imp	port Rules	11:08 AM //

Cataloging- Bulk Import Rules – Mapping Tab

In this area, you will enter all of the combinations of Voyager item type codes (049 \$1) 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.

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

Enter the following data:	
☑ MARC Item Type:	Enter the abbreviated Voyager item type code that is entered in the 049 \$I.
	See section VII for the list of valid abbreviations for this field. Only these abbreviations can be entered in 049 \$1 and therefore mapped to the Voyager item record.
MARC Location Code:	Enter the 4-character OCLC holding code symbol from the 049 \$a.
☑ Voyager Item Type:	Enter the full Item type name to which the item type abbreviation entered in 049 \$I should map.
☑ Voyager Location:	Enter the Voyager location name to which this OCLC holding symbol should map.
	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.
☑ Call Number Hierarchy:	Select the appropriate call number hierarchy for this mapping.
	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.

Cataloging Bulk Import Mapping Settings	
MARC Item Type:	bk1
MARC Location Code:	ABCD
Voyager Item Type:	book
Voyager Location:	Main
Call Number Hierarchy:	Library of Congress
<u>OK</u> <u>C</u> ancel	

Cataloging- Bulk Import Rules – Mapping Tab Settings dialog box

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value
Here is an **example of a very simple mapping table**.

Do <u>not</u> 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

 \oplus NOTE: Libraries <u>must</u> 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 Ma	apping Settings
MARC Item Type:	×
MARC Location Code:	×
Voyager Item Type:	Error
Voyager Location:	Stacks 🔽
Call Number Hierarchy:	LC
<u></u> K	Cancel

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

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

- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

[⊕] Consortial Rule for setting value(s)

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

F. Barcode Tab

🔔 Voyager System A	Administration	×
File Functions H	telp	
Acquisitions	Cataloging - Bulk Import Bules	
Call Slips	Catalognig - Durk Import Rules	
Cataloging	Codes Names	New
	testing One two three	<u>Trow</u>
LUX()	UEMBDREP EmbedHoldingsREPUnicode	Edit
Authority Duplicate	UEMBED EmbedHoldingsUnicode	
Detection Profiles	UERES ElectronicResourcesUnicod	Duplicate
	UEKESKEP ElectronicKesKEPUnicode	
LUX:		<u>→</u> <u>D</u> elete
Bibliographic	Edd Dulle learned Dulle	
Duplicate Detectio	E alt Buik Import Rule:	
	Rule Name Rules Profiles Item Type Mapping Barcode Item Information	
• 🗧	Indicator 1 Indicator 2 Field Subfield	_
Bulk Import Rules	× × 049 o	<u>O</u> rders
1 78 -	Modity	
Call Number Hierarchy		
	Priority <u>R</u> emove	
E.com		
Policy Definitions		
Circulation		
OPAC Configuration		
Search		
Security		
System	Save Cancel	
Web Services		
Cataloging: Bulk Impor	rt Rules	11:55 AM

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:

☑ Field:	049
☑ Subfield:	р
☑ Indicator 1:	*
☑ Indicator 2:	*

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

Cataloging Bulk Import Barcode			
Field: 049	Subfield: p		
Indicator 1: 💌	Indicator 2: ×		
Save	<u>C</u> ancel		

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.

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

Cataloging Bulk Import Copy Numbering Settings
Use Copy <u>N</u> umber From:
Ind 1: 💌 Ind 2: 💌
 If Copy Number Not Present in Incoming Record or Not Specified Above Single Copy = 0; Multiple Copy = 1, 2, 3 Sequentially number copies starting with 1
C Number all copies 0
<u>O</u> K <u>C</u> ancel

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

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

☑ Field	049
☑ Subfield	С
✓ Ind 1	*
✓ Ind 2	*

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

Sequentially number copies starting with	1
--	---

4. Click [OK] when finished.

Item statuses to add	all deselected by default
Magnetic Media [Single Item]	Blank by default
Sensitize [Single Item]	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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

Α.	Rule	Name	Tab

🐊 Voyager System Adn	ninistration	X
File Functions Help		
Acquisitions	Pataloging - Bulk Import Bules	
Call Slips	Jataloging - Dark import Raits	
Cataloging	Codes Names	Mour
	EMBED EmbedHoldinas	14 644
	EMBEDREP EmbedHoldingsREP	Edit
Authority Duplicate	EODYBP EOD Yankee	
Detection Profiles	ERES ElectronicResources	Duplicate
	ERESREP ElectronicResREP	
NY	EXPRESS ExpressMode	Delete
Bibliographic	EXPRREP ExpressREP	0000
Duplicate Detectio	Edit Bulk Import Rule:	
	Bule Name Bules Profiles I Item Type Mapping Barcode I Item Information	
<u>6</u> :8	Contractions Contract Town (Mer Contraction Traction Contractions	1
Bulk Import Bules	Code: EXPRESS	Orders
Duix Import Fuics	code. L'Alless	
	Name: ExpressMode	
1 -		
Call Number Hierarchy		
Enger		
Policy Definitions		
Condition		
Search		
Securitu		
Sustem	Save Cancel	
Web Services		
Cataloging: Bulk Import Ru	lles	4:04 PM

Cataloging- Bulk Import Rules – Rule Name Tab

Enter the following data:

✓ Code (case sensitive):	EXPRESS
☑ Name (case sensitive):	ExpressMode

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

B. Rules Tab

🔔 Voyager System	Administration		-
File Functions H	lelp		
Acquisitions	Catalogir	ng - Bulk Import Bules	
Call Slips	Catalogn	ig - Duik import Ruios	
Cataloging	Codes	Names	New
	EMBED	EmbedHoldings	<u>II</u> CW
LUX C	EMBEDREP	EmbedHoldingsREP	Edit
Authority Duplicate	EODYBP	EOD Yankee	_
Detection Profiles	ERES	ElectronicResources	Duplicate
	ERESREP	ElectronicResREP	
LEX E	EXPRESS	ExpressMode	Delete
Bibliographic	TEXPRREP	ExpressREP	
Duplicate Detectio	Edit Bulk Impo	ort Rule:	
	Rule Name	e Rules Profiles Item Type Mapping Barcode Item Information	
Bulk Import Rules	les Bib Dup Profile: OCLCCondBulk 🔽 🖸rders		
		Auth Dup Profile: AuthReplace	
Call Number Hierarchy		Owning Library: CARLI	
Barra .	Expected Character Set Mapping of Imported Records:		
Policy Definitions	Leave OPAC Suppress Unchanged for Replaced and Merged Records		
Circulation	🗌 🗆 🗖 Bat	ch Opac Suppress	
Search	-		
Security	11		
System	1	Save Cancel	
Web Services	1		
Cataloging: Bulk Impo	t Rules		4:08 PM

Cataloging- Bulk Import Rules – Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCCondBulk
☑ Auth Dup Profile:	AuthReplace
Ø Owning Library:	select your library's Owning Library code
☑ Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)
I Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	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.

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

A. Rule Name Tab

Enter the following data:

✓ Code (case sensitive):	UEXPRREP	
☑ Name (case sensitive):	ExpressREPUnicode	

B. Rules Tab

Enter the following data:

🗹 Bib Dup Profile:	OCLCReplace
☑ Auth Dup Profile:	AuthReplace
🗹 Owning Library:	select your library's Owning Library code
☑ Expected Character Set Mapping:	MARC21 UTF-8
I Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
I Batch Opac Suppress	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:

☑ Code (case sensitive):	EXPRREP
☑ Name (case sensitive):	ExpressREP

B. Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCReplace
☑ Auth Dup Profile:	AuthReplace
Ø Owning Library:	select your library's Owning Library code
☑ Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)
I Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	leave deselected

Legend:

 \oplus Consortial Rule for setting value(s)

- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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

🔔 Voyager System A	Administration	_ _ X
File Functions H	elp	
Acquisitions	Cataloging - Bulk Import Bules	
Call Slips	Cataloging - Durk import Rules	
Cataloging	Codes Names	Maur
	UEMBED EmbedHoldingsUnicode	<u>N</u> ew
LUX C	UERES ElectronicResourcesUnicod	Edit
Authority Duplicate	UERESREP ElectronicResREPUnicode	
Detection Profiles	UEXPRESS ExpressModeUnicode	Duplicate
	UEXPRREP ExpressREPUnicode	
NIX E	UNOHDREP NoHoldingsREPUnicode	Delete
Bibliographic		<u></u> 0.010
Duplicate Detectio	Edit Bulk Import Rule:	
	Rule Name Rules Profiles I tem Type Mapping Barcode I tem Information	
() :::		
Bulk Import Bules	Code: UEMBED	Orders
	Name: EmbedHoldingsUnicode	
Lall Number Hierarchy		
i i i i i i i i i i i i i i i i i i i		
Policy Definitions		
e •		
Circulation		
OPAC Configuration		
Search		
Security		
System	<u>Save</u> <u>Cancel</u>	
Web Services		
Cataloging: Bulk Import	'' I Rules	10:07 PM

Cataloging – Bulk Import Rules – Rule Name Tab

Enter the following data:	
☑ Code (case sensitive):	UEMBED
☑ Name (case sensitive):	EmbedHoldingsUnicode

B. Rules Tab

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

🔔 Voyager System Administration 📃	
File Functions Help	
Acquisitions Cataloging - Bulk Import Bules	
Call Slips Catalog ing - Dark Import Raios	
Cataloging Codes Names	New
UEMBED EmbedHoldingsUnicode	<u></u>
UERES ElectronicResourcesUnicod	<u>E</u> dit
Authority Duplicate UERESREP ElectronicResREPUnicode	
Detection Profiles UEXPRESS ExpressModeUnicode	Duplicate
UEXPRHEP ExpressHEPUncode	
	<u>D</u> elete
Bibliographic Fill local Advantage Redde	
Duplicate Detectro	
Rule Name Rules Profiles I tem Type Magping Barcode Item Information	
Bulk Import Rules Bib Dup Profile: OCLCCondBulk	rders
Auth Dup Profile: AuthReplace	
Call Number Hierarchy Owning Library: CARLI	
Expected Character Set Mapping of Imported Records:	
Policy Definitions Leave OPAC Suppress Unchanged for Replaced and Merged Records	
Circulation Batch Opac Suppress	
OPAC Configuration	
Search	
Security Council Council	
System Lancel	
Web Services	
Cataloging: Bulk Import Rules	10:10 PM

Cataloging – Bulk Import Rules – Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCCondBulk
☑ Auth Dup Profile:	AuthReplace
✓ Owning Library:	select your library's Owning Library code
Expected Character Set Mapping:	MARC21 UTF-8
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	leave deselected

C. Profiles Tab

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

🔔 Voyager System A	dministration				- 🗆 X
File Functions He	lp				
Acquisitions	Catalogin	og - Bully Ir	moort Rules		
Call Slips	Catalogin	ig - Duik II	inport Rules		
Cataloging	Codes	Names			NImu
	SPBINGER	Springer Medicin	e		New
NYX E	test	test	•		Edit
Authority Duplicate	testing	One two three	One two three		Ean
Detection Profiles	UEMBDREP	EmbedHoldingsR	EmbedHoldinasREPUnicode		Duplicate
	UEMBED	EmbedHoldingsU	Inicode	=	
NEW E	UERES	ElectronicResour	rcesUnicod		
	UERESREP	ElectronicResRE	PUnicode	-	Delete
Bibliographic Dunicate Detection CEdit Bulk Import Rule:					
	Rule Name	Dulas Drofi	les Ì Item Tupe Ì Mapping Ì Barr	code] Item Information]	
	Truje Marile		ies item type mapping Dair		
Dulla lava art Dular	Single MF	FHD	Multiple MFHDs		Quidaux 1
Buik Import Rules	Cload	Bib / Auth Oplu		Copy 852-855, 863-878	Urders
	, Loga	bib / Addroniy		Fields From BID to MFHD	
· 📻	C Bibs,	MFHDs	Bibs, MFHDs, m	Copy 856 Field From Bib to	
Call Number Hierarchy			' Items	MIND	
	🔿 Bibs,	MFHDs, POs	- Bibs MEHDs multiple	Lifeate one PU per bibliographic record	
E			C Items, POs	- Automaticallu Approve all	
Policy Definitions	🔁 💿 Bibs,	MFHDs, Items	Lindate previously	POs	
	Diha	NEUD. DO.	C loaded MFHDs and/or	Create DO (MEUD (here for	
	C litems	MIFILUS, FUS,	Items	existing Bibs	
Circulation					
UPAC Configuration		Single Si	ngle MFHD		
Search					
Security			Loc Field: 852		
System			Loc Subfield: b		
Web Services					
Cataloging: Bulk Import	Rules		Loc Indicator 1: *		10:17 PM
			Loc Indicator 2: 🛛 👘		**
			<u>Save</u> <u>C</u> ancel		

Cataloging – Bulk Import Rules – Profiles Tab

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

☑ Copy 852-855, 863-878 Fields From Bib to MFHD:	MUST be checked.
☑ Copy 856 Field From Bib to MFHD:	Recommended to check.

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:

☑ Loc Field:	852
✓ Loc Subfield:	b
☑ Loc Indicator 1:	*
☑ Loc Indicator 2:	*

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.

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

NOTE: It is <u>critical</u> 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

☑ Field:	049
☑ Subfield:	I (that's the letter EL, not the number one)
☑ Indicator 1:	*
☑ Indicator 2:	*

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

Cataloging Bulk Import Item Settings		
Field: 049	Subfield:	
Indicator 1: 🛛 🛛	Indicator 2: 🛛 🗶	
<u>0</u> K	<u>C</u> ancel	

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 \$1) 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].

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

MARC Item Type:	Enter the abbreviated Voyager item type code that is entered in the 049 \$I.
	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.
MARC Location Code:	Enter the 4-character OCLC holding code symbol from the 049 \$a.
☑ Voyager Item Type:	Enter the full Item type name to which the item type abbreviation entered in 049 \$I should map.
Voyager Location:	Enter the Voyager location name to which this OCLC holding symbol should map. Libraries may want to consult the decisions made in their ABBA tables for the MFHD/item record conversion
✓ Call Number Hierarchy:	Select the appropriate call number hierarchy for
	this mapping. 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.

Enter the following data:

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

Cataloging Bulk Import Mapping Settings		
MARC Item Type:	bk1	
MARC Location Code:	ABCD	
Voyager Item Type:	book 💌	
Voyager Location:	Main 💌	
Call Number Hierarchy:	Library of Congress	
<u><u> </u></u>	Cancel	

Cataloging- Bulk Import Rules – Mapping Tab Settings dialog box

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

Do <u>not</u> 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

 \oplus NOTE: Libraries <u>must</u> 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.

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

Cataloging Bulk Import Ma	apping Settings
MARC Item Type:	×
MARC Location Code:	×
Voyager Item Type:	Error
Voyager Location:	Stacks 🔽
Call Number Hierarchy:	LC
<u><u>D</u>K</u>	<u>C</u> ancel

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

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

F. Barcode Tab

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

File Functions Help Acquisitions Cataloging - Bulk Import Rules Call Slips Cataloging Cataloging Codes Names SPRINGER Springer Medicine test test testing One two three			
Acquisitions Cataloging - Bulk Import Rules Cataloging Codes Names Codes Names SPRINGER SPRINGER Springer Medicine Edit test test test testing One two three Edit			
Cataloging Codes Names Cataloging Codes Names SPRINGER Springer Medicine test test testing One two three			
Cataloging Codes Names SPRINGER Springer Medicine			
SPRINGER Springer Medicine test test testing One two three	1		
Lixit test test Edit Authority Duplicate testing One two three			
Authority Duplicate testing One two three			
Detection Profiles UEMBDREP EmbedHoldingsREPUnicode Duplicat			
UEMBED EmbedHoldingsUnicode	_		
UERES ElectronicResourcesUnicod	1		
Bibliographic			
bullugiaphic. Edit Bulk Import Rule:			
Rule Name Rules Profiles Item Type Mapping Barcode Item Information			
Indicator 1 Indicator 2 Field Subfield	1		
Bulk Import Rules			
Moary			
Call Number Hierarchy			
Priority Bemove			
Circulation			
UPAC Configuration			
Search			
Security Canad			
System Save Lance			
web services	_		
Cataloging: Bulk Import Rules 10:48	<u>۳М</u>		

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:

☑ Field:	049
☑ Subfield:	р
☑ Indicator 1:	*
☑ Indicator 2:	*

Cataloging Bulk Import Barcode	
Field: 049	Subfield: p
Indicator 1: 🛛 🗶	Indicator 2: ×
Save	<u>C</u> ancel

Cataloging- Bulk Import Rules – Barcode Tab Settings dialog box

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

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

G. Item Information Tab

🔔 Voyager System A	dministration			- • ×
File Functions He	elp			
Acquisitions	Cataloging	o - Bulk Imr	ort Rules	
Call Slips	Cataloging	g - Duik imp		
Cataloging	Codes	Names		New
	SPRINGER	Springer Medicine		<u>II</u> CW
NUX D	test	test		Edit
Authority Duplicate	testing	One two three		
Detection Profiles	UEMBDREP	EmbedHoldingsREP	Unicode	Duplicate
	UEMBED	EmbedHoldingsUnic	ode 📃	
LUX C	UERES	ElectronicHesources	Unicod	Delete
Bibliographic	JUERESHER	ElectronicheshEFUI	nicode	
Duplicate Detectio	Edit Bulk Import	t Rule:		
	Rule Name	Rules Profiles	Item Type Mapping Barcode Item Information	
●:≣	- Itom Status	iono to odd	- Magnetic Media (Single item)	
Bulk Import Rules		nderu		Orders
		Indery	riela: j Subnela: j Ind I: j Ind 2: j	
		loging neview	Value to match:	
Call Number Hierarchy		liation Review		
Call Hambor Hierarchy		aged	Default is N. When value matches, set to Y.	
	In Pro	ocess		
Delieu Definitions	Lost -	- Library Applied		
Policy Definitions	🗌 📄 Missir	ing	Field: J Subfield: J Ind 1: J Ind 2: J	
പ് പ് പ്	📃 📃 🗆 Witho	drawn	Value to match:	
Circulation				
UPAC Configuration	Сору	y Numbers	Default is Y. When value matches, set to N.	
Search				
Security			Save Cancel	
System				
web services				
Cataloging: Bulk Import	Rules			10:49 PM

Cataloging- Bulk Import Rules – Item Information Tab

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

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

Cataloging Bulk Import Copy Numbering Settings
Use Copy <u>N</u> umber From:
Ind 1: 💌 Ind 2: 💌
 If Copy Number Not Present in Incoming Record or Not Specified Above ○ Single Copy = 0; Multiple Copy = 1, 2, 3 ○ Sequentially number copies starting with 1
C Number all copies 0
<u>O</u> K <u>C</u> ancel

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

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

☑ Field	049
☑ Subfield	С
✓ Ind 1	*
✓ Ind 2	*

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

Sequentially number copies starting with	1
--	---

4. Click [OK] when finished.

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

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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

🔔 Voyager System	Administration	_ 🗆 🗙
File Functions H	lelp	
Acquisitions	Cataloging - Bulk Import Bules	
Call Slips	Catalognig - Durk Import Rules	
Cataloging	Codes Names	Mau
	EMBED EmbedHoldings	<u>IN</u> EVV
LUX:	EMBEDREP EmbedHoldingsREP	Edit
Authority Duplicate	EODYBP EOD Yankee	
Detection Profiles	ERES ElectronicResources	Duplicate
	ERESREP ElectronicResREP	
NIX E	EXPRESS ExpressMode	Delete
Bibliographic	EXPRREP ExpressREP	<u></u> 01010
Duplicate Detectio	Edit Bulk Import Rule:	
Bulk Import Rules	Rule Name Rules Profiles Item Type Mapping Barcode Item Information Code: EMBED Name: EmbedHoldings	Orders
Policy Definitions Circulation OPAC Configuration Search		
Security System Web Services	<u>Save</u>	
Cataloging: Bulk Impo	ut Rules	10:55 PM

Cataloging- Bulk Import Rules – Rule Name Tab

Enter the following data:

✓ Code (case sensitive):	EMBED
☑ Name (case sensitive):	EmbedHoldings

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

B. Rules Tab

🔔 Voyager System A	dministration	_ _ X
File Functions He	2lp	
Acquisitions	Cataloging - Bulk Import Rules	
Call Slips		
Cataloging	Codes Names	New
	EMBED EmbedHoldings	
	EMBEDREP EmbedHoldingsREP	<u>E</u> dit
Authority Duplicate	EODYBP EOD Yankee	
Detection Profiles	ERES ElectronicHesources	Duplicate
	EXPRESS ExpressMode	
	EXPRREP ExpressREP	<u>D</u> elete
Bibliographic Duplicate Detectio	Edit Bulk Import Rule:	
	Bule Name (Rules) Profiles (Hen Tupe) Mapping (Parcede) Hen Information)	
<u>∕</u> ••⊒	nuje vane [ingles] nojnes joen type wagping Dalcode ijen montation	1
Bulk Import Rules	Bib Dup Profile: OCLCCondBulk	Orders
	Auth Due Duelles AuthPapipas	
	Autri Dup Pronie: Autri-replace	
Call Number Hierarchy	Owning Library: CARLI	
	Expected Character Set Mapping of MARC21 MARC-8 (non-Unicode)	
Delley Defeitions	Imported Necolds.	
Policy Derinitions	Leave OPAC Suppress Unchanged for Beplaced and Merged Becords	
l Q P		
Urculation	🗖 Batch Opac Suppress	
Search		
Security		
System	<u>Save</u> <u>C</u> ancel	
Web Services		
Cataloging: Bulk Import	Rules	10:55 PM
		1 ///

Cataloging- Bulk Import Rules – Rules Tab

Enter the following data:

☑ Bib Dup Profile:	OCLCCondBulk
☑ Auth Dup Profile:	AuthReplace
Ø Owning Library:	select your library's Owning Library code
☑ Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	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.

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

A. Rule Name Tab

Enter the following data:

✓ Code (case sensitive):	UEMBDREP	
☑ Name (case sensitive):	EmbedHoldingsREPUnicode	

B. Rules Tab

Enter the following data:

☑ Bib Dup Profile	OCLCReplace
☑ Auth Dup Profile	AuthReplace
🗹 Owning Library	select your library's Owning Library code
☑ Expected Character Set Mapping	MARC21 UTF-8
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	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:

✓ Code (case sensitive):	EMBEDREP
☑ Name (case sensitive):	EmbedHoldingsREP

B. Rules Tab

Enter the following data:

☑ Bib Dup Profile:	OCLCReplace
☑ Auth Dup Profile:	AuthReplace
☑ Owning Library:	select your library's Owning Library code
Image: Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	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:

 \oplus Consortial Rule for setting value(s)

- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

🐊 Voyager System /	Administration		- X
File Functions H	lelp		
Acquisitions	Catalogin	a – Bulk Import Bules	
Call Slips	Catalogii	ig - Duik import Ruics	
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	testing	One two three	<u>IN</u> GVV
LEX E	UEMBDREP	EmbedHoldingsREPUnicode	Edit
Authority Duplicate	UEMBED	EmbedHoldingsUnicode	
Detection Profiles	UERES	ElectronicResourcesUnicod	Duplicate
	UERESREP	ElectronicResREPUnicode	
NEW P	UEXPRESS	ExpressModeUnicode	Delete
Bibliographic	UEXPRREP	ExpressREPUnicode	Delete
Duplicate Detectio	Edit Bulk Impo	ort Rule:	
Bulk Import Rules	Ruļe Name (Rules Profiles Leter Type Mapping Barcode Leter Information	Orders
Policy Definitions Circulation DPAC Configuration DPAC Configuration Search Security System Web Services		<u>Save</u> <u>C</u> ancel	
Cataloging: Bulk Impo	 rt Rules		11:09 PM
e			

A. Rule Name Tab (for both models)

Cataloging- Bulk Import Rules – Rule Name Tab

Enter the following data:	
Code (case sensitive)	UERES
Name <i>(case sensitive)</i>	ElectronicResourcesUnicode

B. Rules Tab:

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

🐊 Voyager System A	dministration		
File Functions He	lp		
Acquisitions	Catalogin	og - Rulk Import Rules	
Call Slips	Catalogin	B Duk import Rules	
Cataloging	Codes	Names	New
	testing	One two three	<u></u>
LUX C	UEMBDREP	EmbedHoldingsREPUnicode	Edit
Authority Duplicate	UEMBED	EmbedHoldingsUnicode	
Detection Profiles	UERES	ElectronicResourcesUnicod	Duplicate
	UERESREP	ElectronicResHEPUnicode	
UXC	UEXPRESS	ExpressPEPL bicode	<u> →</u> <u>D</u> elete
Bibliographic	F D D H J		
Duplicate Detectio	Edit Bulk Impo	rt Rule:	
	Rule Name	Rules Profiles Item Type Mapping Barcode Item Information	
Bulk Import Rules		Bib Dup Profile: OCLCCondBulk	<u>O</u> rders
1			
Call Number Hierarchy		Owning Library: CARLI	
255 Policy Definitions		Expected Character Set Mapping of MARC21 UTF-8	
@ •	🗖 Lea	ve OPAC Suppress Unchanged for Replaced and Merged Records	
Circulation	E Bati	ch Opac Suppress	
OPAC Configuration			
Search			
Security			
System		<u>Save</u>	
Web Services			
Cataloging: Bulk Import	Rules		11:11 PM

Cataloging- Bulk Import Rules – Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCCondBulk
☑ Auth Dup Profile:	AuthReplace
Ø Owning Library:	select your library's Owning Library code
Expected Character Set Mapping:	MARC21 UTF-8
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	leave deselected

C. Profiles Tab (Embedded Holdings model):

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

🔔 Voyager System Ac	dministration				
File Functions Hel	lp				
Acquisitions Call Slips	Cataloging	g - Bulk Imj	port Rules		
Cataloging	Codes I	Names			New
Authority Duplicate	testing I UEMBDREP I UEMBED I	One two three EmbedHoldingsREF EmbedHoldingsUnic	PUnicode code		<u>E</u> dit
Detection Fronies	UERESBEP	ElectronicResREPL	Inicode	E	Duplicate
NIX D Bibliographic	UEXPRESS I UEXPRREP I	ExpressModeUnico ExpressREPUnicod	de le	•	<u>D</u> elete
Duplicate Detectio	Edit Bulk Import	Rule:			
Bulk Import Rules	Rule Name Single MFH C Load B	R <u>u</u> les Pro <u>f</u> iles HD ib / Auth Only	Utem Type Mapping B Multiple MFHDs Bibs, MFHDs, Pl	arcode Item Information Copy 852-855, 863-878 Fields From Bib to MFHD	Orders
Call Number Hierarchy	G Bibs, M	FHDs FHDs, POs	C Bibs, MFHDs, m	Copy 856 Field From Bib to MFHD Create one P0 per	
Policy Definitions	C Bibs, M	FHDs, Items FHDs, PNs	Update previously	Automatically Approve all POs Create PD/MEHD/Item for	
Circulation	ltems		Items	existing Bibs	
OPAC Configuration Search	Si	ngle Single	MFHD		
Security System Web Services			Loc Field: 852	bel	
Cataloging: Bulk Import F	Rules	L	oc sublield: D		11:16 PM
		Loc Loc	Indicator 1: * Indicator 2: *		VIII
			<u>S</u> ave <u>C</u> ancel		

Cataloging- Bulk Import Rules – Profiles Tab

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

☑ Copy 852-855, 863-878 Fields From Bib to MFHD:	MUST be checked.
Copy 856 Field From Bib to MFHD:	MUST be checked.

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:

✓ Loc Field:	852
✓ Loc Subfield:	b
☑ Loc Indicator 1:	*
☑ Loc Indicator 2:	*

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

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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:

☑ Copy 852-855, 863-878 Fields From Bib to MFHD:	MUST be checked.
Orgen Copy 856 Field From Bib to MFHD:	MUST be checked.

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:

☑ Loc Field:	049
☑ Loc Subfield:	а
☑ Loc Indicator 1:	*
☑ Loc Indicator 2:	*

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)

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

🐊 Voyager System A	dministration						- 0 X
File Functions He	lp						
Acquisitions	Catalogi	og - Bulk Impo	rt Rules				
Call Slips	Catalogn	ig - Duik impo	It IXuies				
Cataloging	Codes	Names				*	New
	testing	One two three					
UXC	UEMBDREP	EmbedHoldingsREPUni	code				Edit
Authority Duplicate	UEMBED	EmbedHoldingsUnicode					
Detection Profiles	UERES	ElectronicResourcesUni	cod				Duplicate
	UERESREP	ElectronicResREPUnico	ide .				
LIX	UEXPRESS	ExpressModeOnicode				-	<u>D</u> elete
Bibliographic	Edb Dulle large	expressiver onledge					
Duplicate Detectio	Ealt Buik Imp	ort Hule:					
	Rule Name	e R <u>u</u> les Pro <u>f</u> iles <u>I</u>	tem Type Mag	oing <u>B</u> arcode	l <u>t</u> em Info	rmation	
6:8	MARCIN	m Item Tune MARCI	oc Location				
Bulk Import Rules	×	electronic filu *	Electronic Col	ections		Add	<u>O</u> rders
· 📻						<u>M</u> odify	
Call Number Hierarchy							
						<u>R</u> emove	
Bolicy Definitions							
Correl							
Securitu							
Sustem			Save	Cancel			
Web Services							
Cataloging: Bulk Import	Rules						11:28 PM

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:	
🗹 MARC Item Type:	Enter an asterisk in this field.
	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.
☑ MARC Location Code:	Enter the Voyager location <u>code</u> that staff will enter in the bib record's 852 \$b, to be copied into the MFHD.

- Onsortial Rule for setting value(s)
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 O
- ✓ CARLI Recommendation for setting value(s)
- \oslash Does not apply; Or, Do not change this value

☑ Voyager Item Type:	Select an appropriate Voyager item type from the drop down list.		
	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.		
☑ Voyager Location:	Enter the Voyager location <u>name</u> to which the Voyager location code should map.		
	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.		
☑ Call Number Hierarchy:	Select the appropriate call number hierarchy for this mapping.		

 Cataloging Pulk Import Manajag Cathings			
сасаюўну вык тпрогс ма	pping secongs		
MARC Item Type:	×		
MARC Location Code:	online		
Voyager Item Type:	electronic file		
Voyager Location:	Electronic Collections		
Call Number Hierarchy:	Other 🔽		
<u>0</u> K	Cancel		

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

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

* Error * Error LC

\oplus NOTE: Libraries <u>must</u> 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:

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

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.

Cataloging Bulk Import Ma	pping Settings
MARC Item Type:	8
MARC Location Code:	x
Voyager Item Type:	Electronic1
Voyager Location:	Online Resources
Call Number Hierarchy:	Library of Congress
<u><u> </u></u>	Cancel

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \oslash 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.

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

Description:

MARC Item Type:	Enter an asterisk in this field.
	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.
MARC Location Code:	Enter the 4-character OCLC holding code symbol from the 049 \$a.
☑ Voyager Item Type:	Select an appropriate Voyager item type from the drop down list.
	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.
☑ Voyager Location:	Enter the Voyager location <u>name</u> to which the 049 \$a data should map.
	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.
☑ Call Number Hierarchy:	Select the appropriate call number hierarchy for this mapping.

Cataloging Bulk Import Mapping Settings	
MARC Item Type: ×	
MARC Location Code: ABCE	
Voyager Item Type: electronic file	
Voyager Location: Electronic Collections	
Call Number Hierarchy: Other	
<u>D</u> K <u>C</u> ancel	

Cataloging- Bulk Import Rules – Mapping Tab Settings Workspace

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

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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
*	Electrnic1	ABCE	Online Resou	LC
*	Electrnic1	ABCG	Online GovDo	SuDoc
*	Error	*	Error	LC

 \oplus NOTE: Libraries <u>must</u> 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:

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

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.

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

Cataloging Bulk Import Mapping Settings		
MARC Item Type:	li -	
MARC Location Code:	×	
Voyager Item Type:	Electronic1	
Voyager Location:	Online Resources	
Call Number Hierarchy:	Library of Congress	
<u>0</u> K		

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)

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

A Voyager System	Administration		- • • ×
File Functions H	lelp		
Acquisitions	Cataloging - Bulk Import Bules		
Call Slips	Cataloging - Durk Import Rules		
Cataloging	Codes Names		Mou
	EMBEDREP EmbedHoldingsREP		<u>IN</u> EW
LUX:	EODYBP EOD Yankee	E	Edit
Authority Duplicate	ERES ElectronicResources		
Detection Profiles	ERESREP ElectronicResREP		Duplicate
	EXPRESS ExpressMode		
ETX 2	EXPRREP ExpressREP		Delete
Bibliographic	JGDC B AU GDC BIB AUTH Import Rule	•	<u>D</u> 01010
Duplicate Detectio	Edit Bulk Import Rule:		
⊜∷≣ Bulk Import Rules	Rule Name Rules Profiles Item Type Mapping Barcode Item Information Code: ERES		<u>O</u> rders
Call Number Hierarchy	Name: ElectronicResources		
Policy Definitions			
Circulation			
	-		
Search			
Security			
System	<u>Save</u>		
Web Services			
Cataloging: Bulk Impo	rt Rules		11:49 PM

Cataloging- Bulk Import Rules – Rule Name Tab

Enter the following data:

✓ Code (case sensitive):	ERES
☑ Name (case sensitive):	ElectronicResources

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

A Voyager System A	dministration	X
File Functions He	lp	
Acquisitions	Cataloging - Bulk Import Bules	
Call Slips	Cataloging - Durk import Rules	
Cataloging	Codes Names	Maria
	EMBEDBEP EmbedHoldingsBEP	
NY	ENDYBP END Yankee	E Edit
Authority Duplicate	ERES ElectronicResources	
Detection Profiles	ERESREP ElectronicResREP	Dunlicate
	EXPRESS ExpressMode	
K KMO	EXPRREP ExpressREP	
	GDC B AU GDC BIB AUTH Import Rule	<u>□</u> elete
Bibliographic Duplicate Detectio	Edit Bulk Import Rule:	
	Bule Name Bules Profiles Litem Tune Manning Barcode Litem Inform	ation
<u>_</u> •⊒		
Bulk Import Rules	Bib Dup Profile: OCLCCondBulk	Orders
	Auth Dup Profile: AuthReplace	
17		
Call Number Hierarchy	Owning Library: CARLI	•
	Expected Character Set Mapping of MARC21 MARC-8 (non-Unicode)	
	Imported Records:	
Policy Definitions		
_ @ _	Leave OPAC Suppress Unchanged for Replaced and Merged Records	
Circulation	Batch Opac Suppress	
OPAC Configuration		
Search		
Security		
System	<u>Save</u> <u>C</u> ancel	
Web Services		
Cataloging: Bulk Import	Rules	11:51 PM

B. Rules Tab (Embedded Holdings model):

Cataloging- Bulk Import Rules – Rules Tab

Enter the following data:

Ø Bib Dup Profile:	OCLCCondBulk
✓ Auth Dup Profile:	AuthReplace
🗹 Owning Library:	select your library's Owning Library code
☑ Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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:

✓ Code (case sensitive):	UERESREP
☑ Name (case sensitive):	ElectronicResREPUnicode

B. Rules Tab (for both models):

Enter the following data:	
☑ Bib Dup Profile:	OCLCReplace
☑ Auth Dup Profile:	AuthReplace
☑ Owning Library:	select your library's Owning Library code
I Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	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:

✓ Code (case sensitive):	ERESREP
☑ Name (case sensitive):	ElectronicResREP

B. Rules Tab (for both models):

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

Enter the following data:

Ø Bib Dup Profile:	OCLCReplace
☑ Auth Dup Profile:	AuthReplace
Ø Owning Library:	select your library's Owning Library code
☑ Expected Character Set Mapping:	MARC21 MARC-8 (non-Unicode)
☑ Leave OPAC Suppress Unchanged for	typically leave deselected, note VI.A. above.
Replaced and Merged Records	
☑ Batch Opac Suppress	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.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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	Voyager Item	MARC	Voyager Item	MARC	Voyager Item
Type	туре матте	Type	туре матте	Type	туре матте
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	Мар3	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	RecordngRE	Sofn	SoftwareN	othn	OtherN
Reclr	RecordngLR	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:

 \oplus Consortial Rule for setting value(s)

☑ CARLI Recommendation for setting value(s)

 \varnothing 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

Acquisitions	Cataloging - RDA Toolkit
Cataloging	Edit RDA Toolkit Options
	Enable RDA Toolkit Links
Bibliographic	Username:
Duplicate Detectio	Password:
6 :8	Base URL: http://access.rdatoolkit.org/?encode=marc&rec=
Bulk Import Rules	Leave Username and Password blank if you use IP authentication or if your Cataloging operators have their own username/password.
Call Number Hierarchy	<u>Save</u> <u>Cancel</u>
हिल्ल Policy Definitions	
RDA Toolkit	

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:

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing 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.

Session Defaults and Preferences					
Username: Password:					
Cataloging module – Options – Session Defaults and Preferences – RDA Toolkit					

C. Base URL

Acquisitions	Cataloging - RDA Toolkit				
Call Slips					
Cataloging	Edit RDA Toolkit Uptions				
	Enable RDA Toolkit Links				
Bibliographic	Username:				
Duplicate Detectio	Password:				
▲ •⊒	Base URL: http://access.rdatoolkit.org/?encode=marc&rec=				
••					
Bulk Import Rules	Leave Username and Password blank if you use IP authentication or if your Cataloging operators have their own username/password.				
Call Number Hierarchy	<u>Save</u> <u>Cancel</u>				

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:

- \oplus Consortial Rule for setting value(s)
- $\ensuremath{\boxtimes}$ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value