# Importing MARC Bibliographic Records
# Using Voyager Acquisitions

In the Voyager Acquisitions client, library staff may import bibliographic records to a purchase order, creating line items, bibs and holdings in Voyager. This file of MARC records may be created by exporting records from WorldCat, downloading a file from Collection Manager or a vendor, or might include data converted into MARC format using MarcEdit. CARLI recommends using the Unicode character set (MARC21 UTF-8) whenever possible for record set files.

## Part 1. Configuring Acquisitions Client Preferences

Before beginning to import bibliographic records, library staff must select the character set for the records being added.

1. In the Voyager Acquisitions client, go to the **Tools** menu, select **Workflows**.

2. Be sure you are on the **Searching** tab. Look for the **Bibliographic Staff Searching/Import** section.

3. In the setting box for **Character Set Mapping for Local Import**, select the character set (e.g., "MARC21 UTF-8" or "MARC21 MARC-8 (non-Unicode)") for the records in your import file. Note: You may determine the character set of a record from byte 9 of the bib record Leader. The value "a" indicates the record is Unicode; a blank indicates non-Unicode.
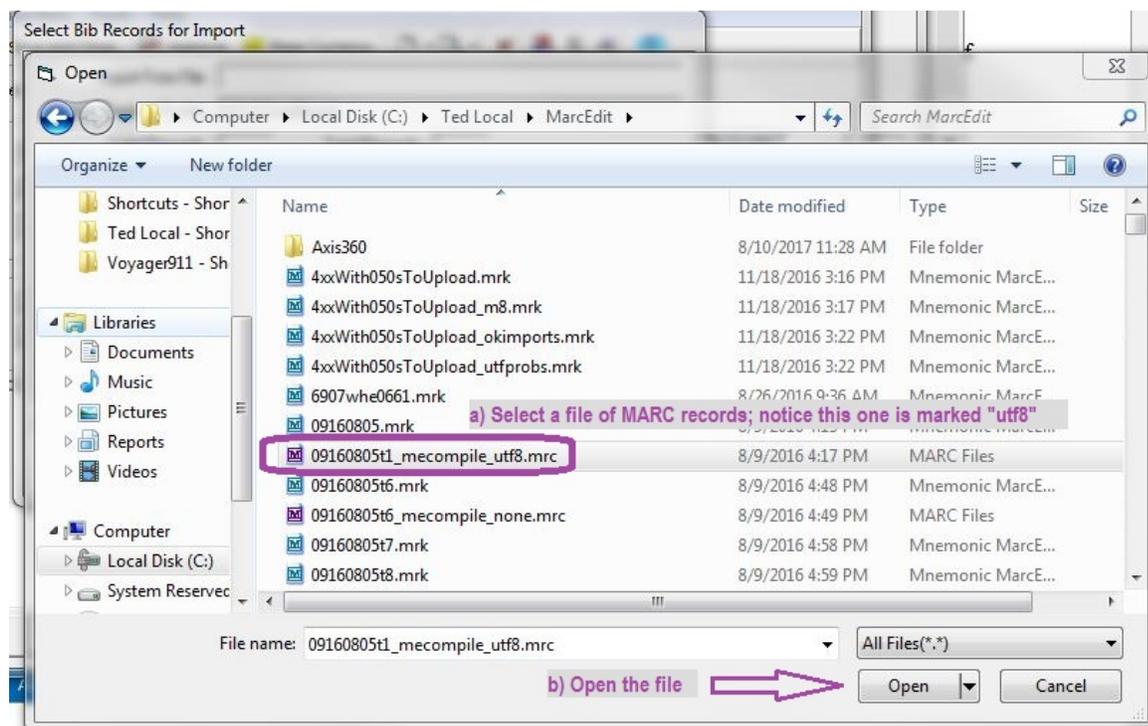
4. Select the **OK** button.

Figure 1: Select the character set that corresponds to the MARC record file that you created or received.
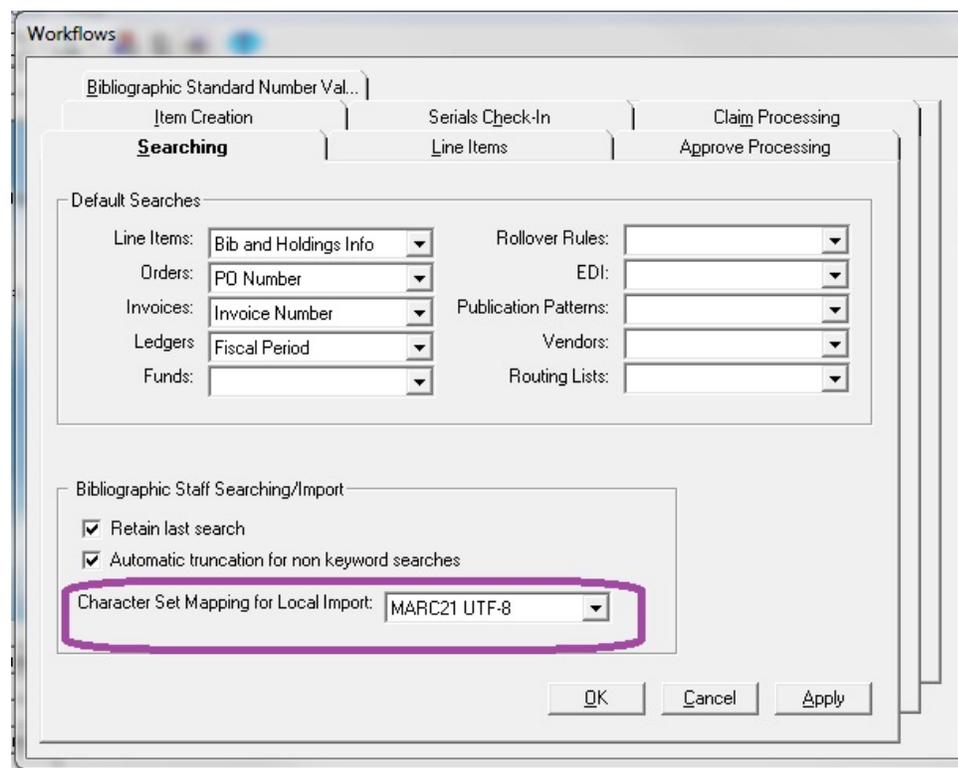
## Part 2. Importing Bibliographic Records to a Purchase Order

1. Create a Voyager purchase order according to your library's practices.

2. Save the purchase order before adding line items.

3. Click **Add Line (Bib Import)** to retrieve records exported from OCLC.

4. Choose the file containing the records exported for the order. (Figure 2)

> Figure 2. An open file dialog for the Add Line (Bib Import) function. Note that the file selected has also been smartly marked as "utf8" by the creator; not all files are marked this way.



5. The Select Bib Records for Import window should appear with the contents of the MARC records file. (Figure 3)

   a. The MARC button will display a single, highlighted record in a window.

   b. Select the New File button if the file you chose doesn't contain the records you plan to import.

   c. The Import button will attempt to add the bib record to Voyager using the duplicate detection profile listed in the Import/Replace Profile box..
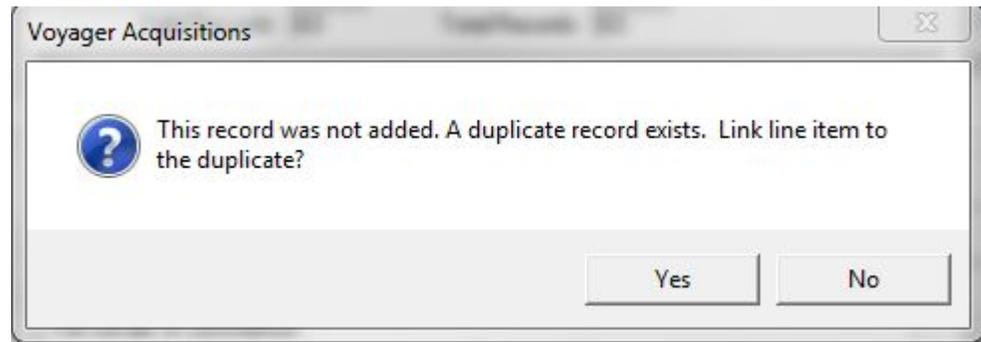
Figure 3. The Select Bib Records for Import window. The import file name is shown, along with the duplicate detection profile, which is set in System Administration (Acquisitions Policy Definitions).
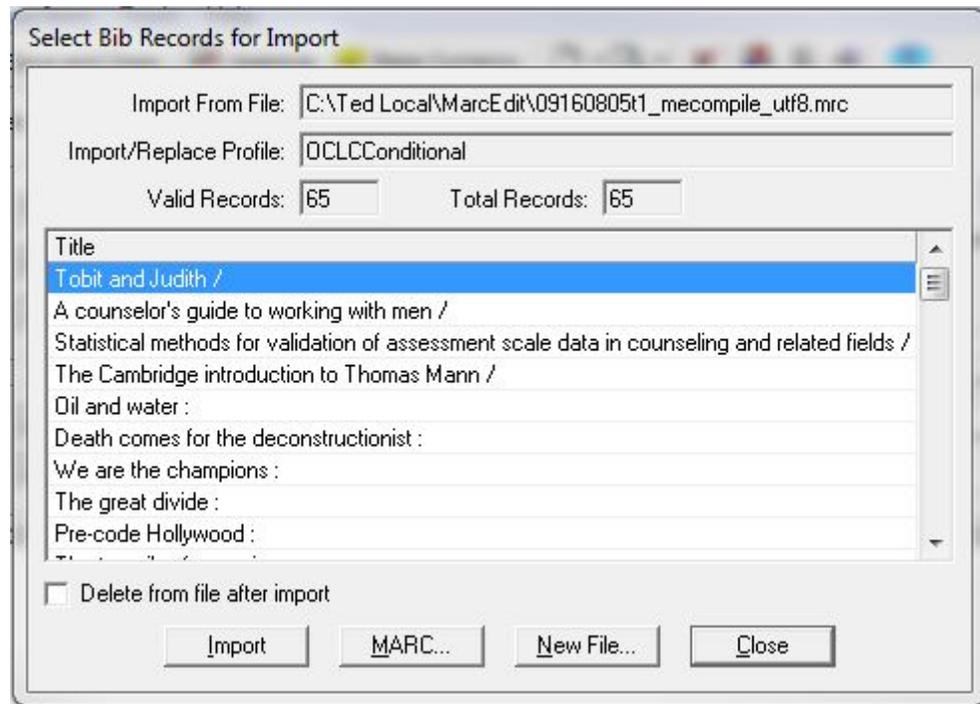


6. Select one or more titles* to add and click **Import**.

    a. You will not see anything happen immediately to the purchase order.

    b. If you have checked the "Delete from file after import" option, then you will see the titles removed from the list.

    c. If the record you selected does not match the character set chosen, you will receive an "Unable to add record" error. Recheck your settings from Part 1 above and continue.

    d. If Voyager detects a duplicate record, you will receive an alert: "This record was not added. A duplicate record exists. Link line item to the duplicate?" (Figure 4)

        i. Choose **Yes** if you want to use the existing record and its holdings for the order.

        ii. Choose **No** if you want to investigate the record before continuing, or if the old information shouldn't be re-used.

    **\*Note:** It is possible, and perhaps desirable to add multiple line items to the purchase order at one time. However, when a title is not added due to duplicate detection, the warning message will not identify which title(s) were duplicated.

Figure 4. The duplicate detection dialog box. Note that the message does not say which record matched a duplicate.



7.  Select the **Close** button when you are ready to edit the line items, which will appear in the bottom area of the purchase order after the Select Bib Records for Import window closes. (Figure 5)

Figure 5. A purchase order with a single imported bib record. The line item area remained blank until the staff member selected the Close button.
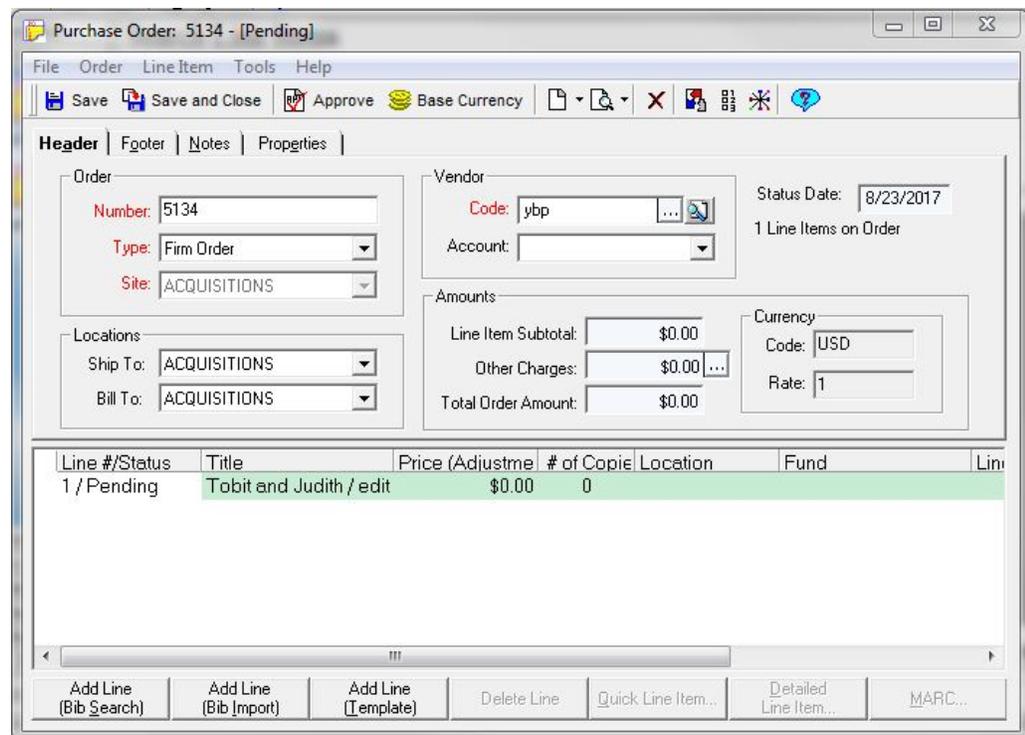


## Part 3. Next Steps

When a staff member successfully imports a bib record as a line item, that bib record is saved to the Voyager database. Note in Figure 5 that no other data appears on the line item yet. If you search in Cataloging for this record, you would only find a bib. A holding record will be added later after the acquisitions operator adds data to the Copies/Funds tab of the line item