

# Importing Bibliographic Records from MARC Record Files Using the Voyager Cataloging Client

Library staff will typically use the Cataloging client to add most records into Voyager. The import process involves selecting a file of records, then selecting records from that file for import. Records may be edited prior to saving to the database. If a duplicate record is found in Voyager, library staff must decide whether to replace the existing bib with the imported bib.

The import process may also be used to replace existing records with updated versions from WorldCat or other sources. When replacing records, library staff should follow CARLI's "Safe Bibliographic Record Replacement Routines."

## Part 1. Configuring Cataloging Client Preferences

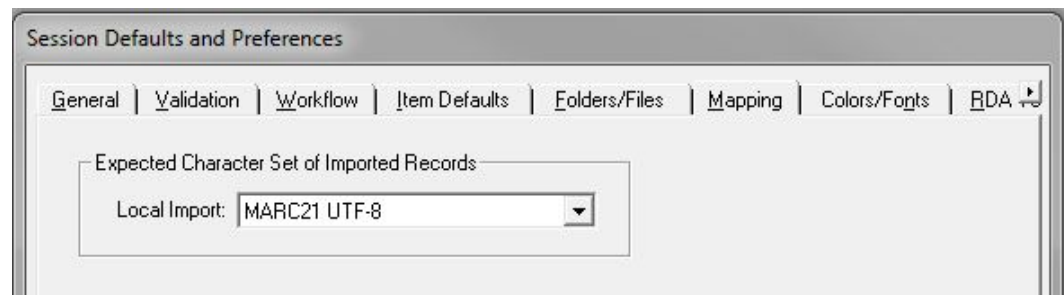
Before beginning to import records, library staff should configure Cataloging client preferences for import. There are two sets of required preferences for import: setting the expected character set, and setting the duplicate detection profile. There are also two optional preferences to configure: the default folder for finding import files, and deleting records from import files.

### A. Configuring required preferences

1. Choose the **Options** menu; then select **Preferences**.
2. Select the **Mapping** tab of the Preferences window.
3. Check the contents of the **Expected Character Set of Imported Records** setting. This should be set to "MARC21 UTF-8." If your record set has a different character set, change this value accordingly to "MARC21 MARC-8 (non-Unicode)" or another value as needed.

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.

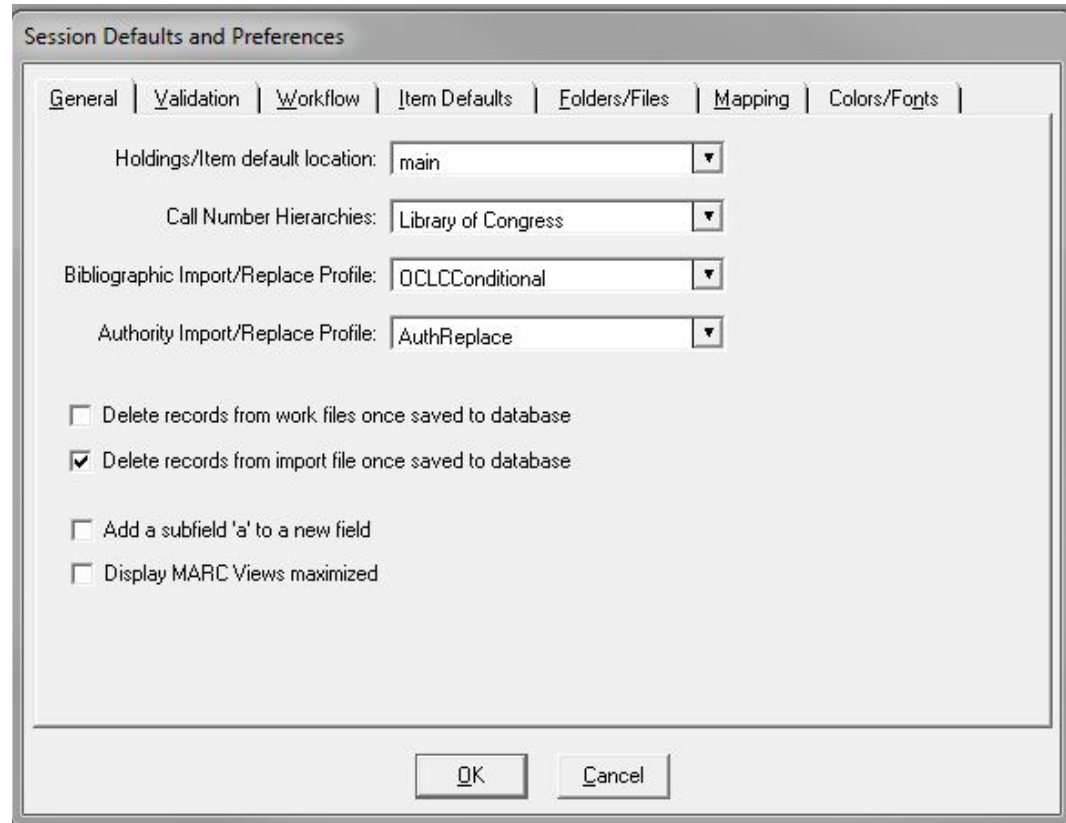
Figure 1. Cataloging Preferences, Mapping tab. Select the character set for the MARC records file in the Local Import drop down list.



4. Select the **General** tab of the Preferences window.
5. Check the contents of the **Bibliographic Import/Replace Profile** setting. Select the option for "OCLCConditional," so that the system will detect duplicate records, and alert you to the duplicates before completing a save. (Figure 2)

The OCLCConditional rule compares bib records' standard number values and assigns a point value to each type of match: OCLC number/035\$a (100), ISBN (10), ISSN (10), LCCN (10), other standard number/028\$a (10).

Figure 2. Cataloging Preferences, General tab. The Import/Replace profile selected is OCLCConditional. Note also the option for “Delete records from import file once saved to database” is selected.



6. Select the **OK** button to save your preferences.

## B. Configuring optional preferences

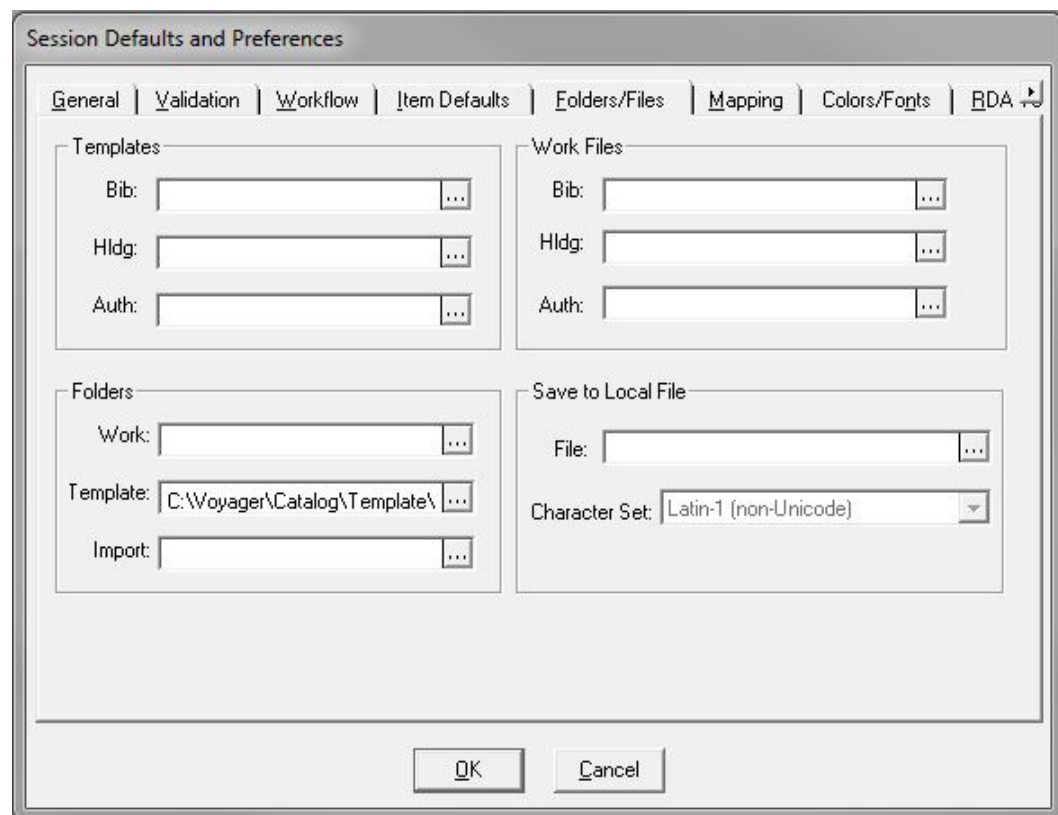
The first option to consider is “Delete records from import file once saved to the database.” In general, deleting each record as it is saved to the database helps a staff member keep track of what’s done and what’s left to import. There may be situations where you will want to keep the records in the original file for reference; in those cases, having the “Delete records” option unselected might be beneficial

1. Choose the **Options** menu; then select **Preferences**. (Figure 2)
2. On the **General** tab of the Preferences window, check or uncheck the setting for “Delete records from import file once saved to the database,” according to your needs.
3. Select the **OK** button to save your preferences.

Library staff may also choose to set a default location where the Cataloging client will look for record files. This is useful if you have a standard location where record files are saved, for example, a shared network drive. Setting the default provides a shortcut to locating the files later. If staff are comfortable with the Windows “open file” dialog box, and can navigate successfully to other folders, then you may consider this preference as optional.

1. Select the **Folders/Files** tab.
2. Look to the **Folders** section in the lower left, and click in the box for **Import**. (Figure 1)

Figure 3. Cataloging Preferences, Folders/Files tab. Tap into the Import box or tap the ... button.

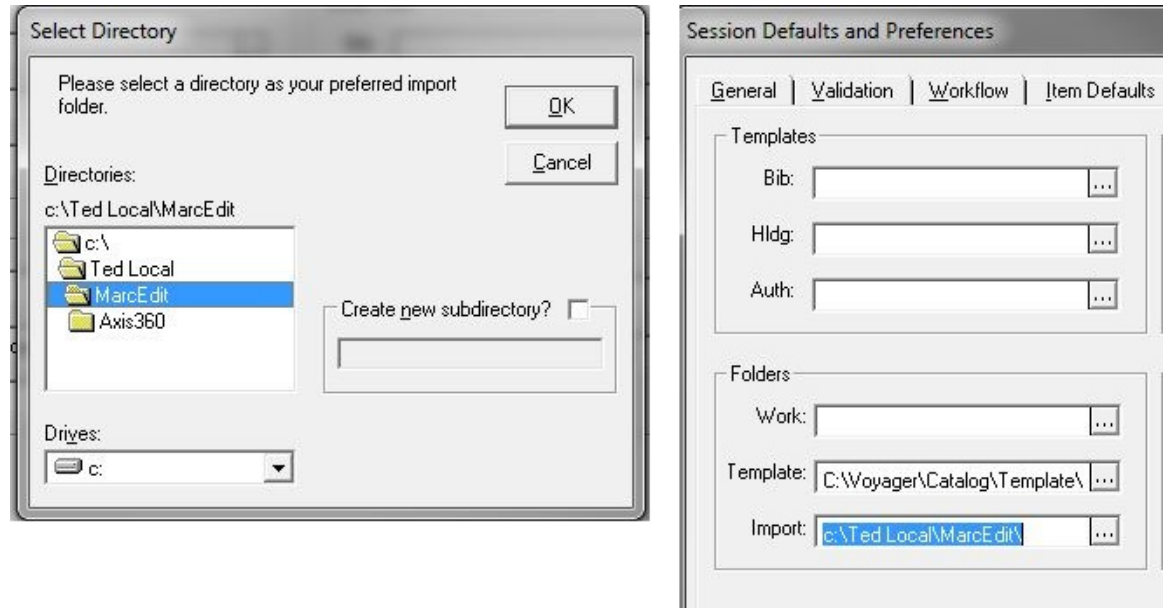


3. If you know the path to your file of records, you may type it directly; or, you may click the ellipsis button (...) to browse to the folder; navigate between folders by double-clicking on the folder name. (Figure 4) Choose the folder you want as a default, and select **OK**.

Note: Because this is an old style file dialog box, finding locations such as your desktop or downloads folder will require knowing their actual path, starting with a drive letter. You will not be able to find folders such as “Desktop” or “My Documents,” or network folders that use “UNC” path notation.

Figure 4 (left) The Select Directory dialog. The lowest folder with an open folder icon will be your default. Select OK when you are satisfied with your choice.

Figure 4 (right) The Folders/Files tab with a default import folder selected.



## Part 2. Importing Records

Once the client defaults are configured, you may begin to import records. You may edit the records further, if necessary, then save the records to the database. Duplicate detection occurs when you attempt to save the record to the database.

If the cataloger will be replacing existing bib records with the imported records, then the cataloger should begin the Safe Bibliographic Replacement Routines before starting to import.

If you will be importing records to replace existing bib records in your database, be sure to follow CARLI's "Safe Bibliographic Record Replacement Routines."

1. If the bibliographic record to be replaced is not suppressed—i.e., the "Suppress from OPAC" box is unchecked, or the bib does not contain 049 \$u nouc—then suppress the record using one of these two methods.
2. Wait until after the top of the hour
3. Once the necessary amount of time has passed, add the OCLC record number to the existing record. Open the Cataloging client to search for the record and display it on the screen. Add an 035 field, subfield a, and enter the OCLC number with a prefix of (OCoLC)ocm, (OCoLC)ocn, or (OCoLC)on, depending on the number of digits in the OCLC number. **Save to DB.**

Ex.: 035 \_\_ \_ ‡a (OCoLC)ocm12345678

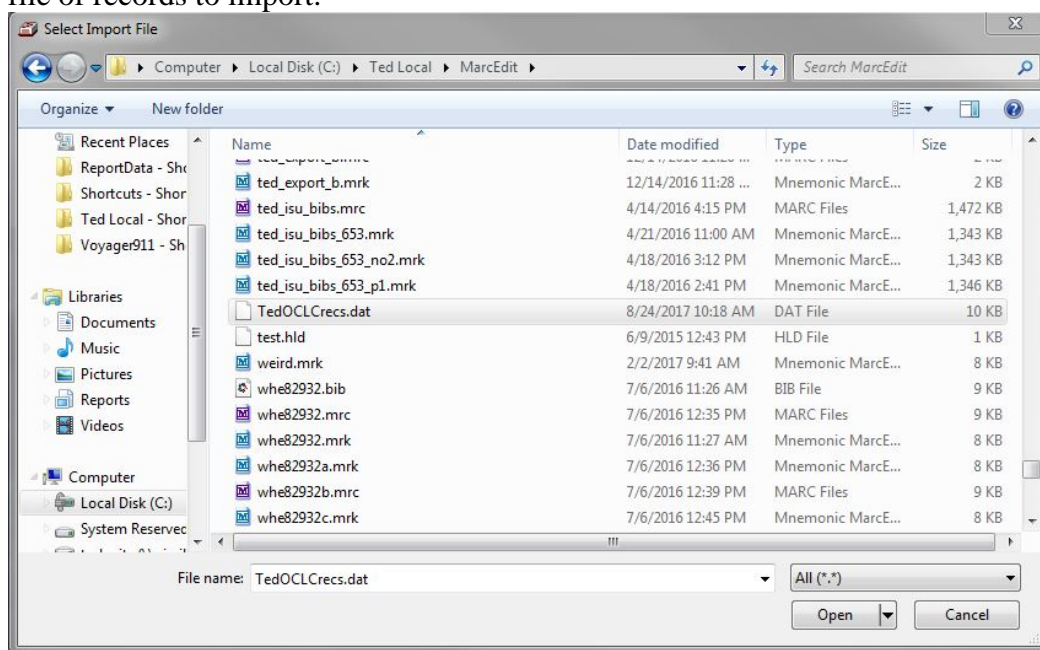
035 \_\_ \_ ‡a (OCoLC)ocn123456789

035 \_\_ \_ ‡a (OCoLC)on1234567890

## A. Importing new records

1. In the Cataloging client, go to the **Record** menu, choose **Import**, then **from New File**.
2. The select import file dialog will open. Locate and select the file containing the records you want to import, then select **Open**. (Figure 5)
  - Note: Some common file extensions for MARC files include:
    - .mrc (MarcEdit, OCLC Collection Manager, some vendors)
    - .dat (Connexion export files)
    - .bin (some vendors)
    - .bib (Voyager save files)

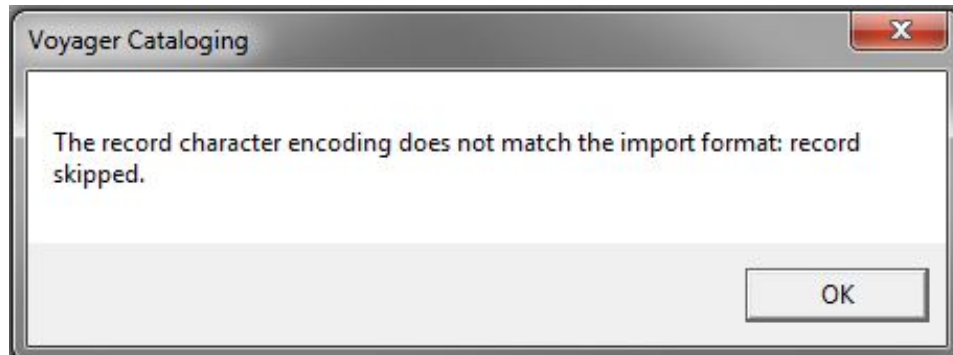
Figure 5. The Select Import File dialog. Change folders if needed, and locate the file of records to import.



3. After opening the file, you may get one of two results.
  - a. “The record character encoding does not match the import format: record skipped.” (Figure 6) One or more of the records in the file are not in the character set you selected in part 1 above. Repeat part 1, steps 1-3 to correct for this mismatch.

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.

.Figure 6. Character encoding does not match message. Revisit your cataloging preferences and change the expected character set value.

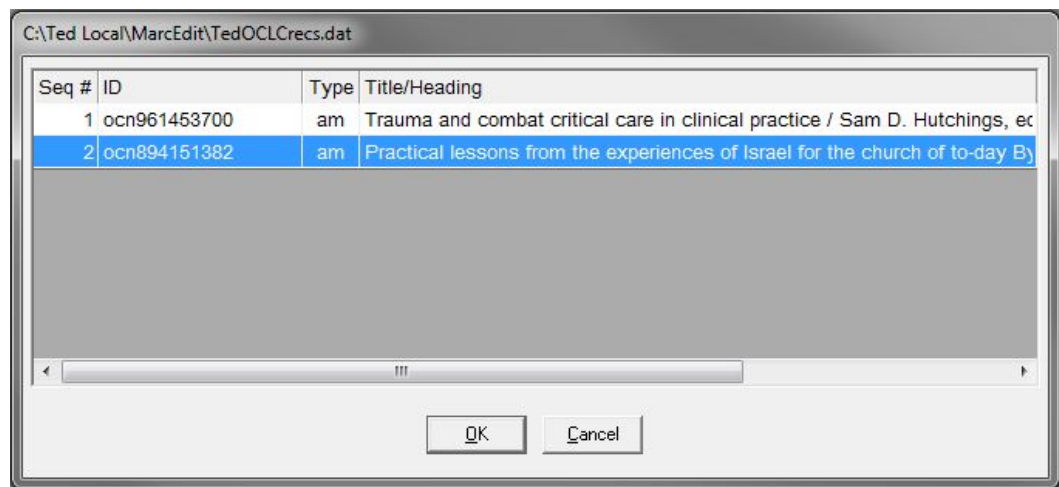


- b. A list of the records will be displayed. (Figure 7)

Note: It is possible, though unusual, to see both the title list and the character encoding message. That usually means that records were added to a file at different times using different character sets.

- c. If you get a different message, there may be errors in the record file. You may be able to correct some errors in MarcEdit; otherwise, download new records files.

Figure 7. The import titles list. It shows the records in the order they were added to the file. The import titles list appears even when the file contains only one title.

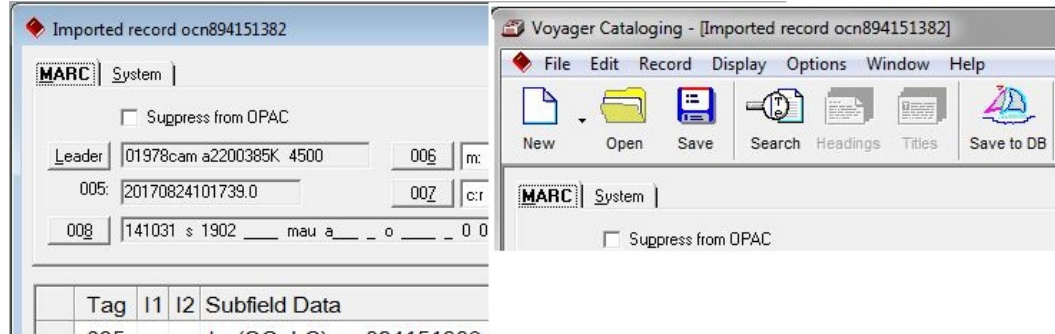


4. To import any record, select it. Note, you will need to click a record again to “unselect” it. Click **OK** when ready to import.
5. The bib record will be opened in a new window within the Catalog client. The title bar for the window will show “Imported record” followed by the record number from the source system. This will be whatever number was in the 001 of the original record. (Figure 8a)

If the MARC view is maximized, then the title bar for the Cataloging client will contain the “Imported record” and record number text. (Figure 8b)

Figure 8a (left) The imported record window in the Cataloging client workspace. The original record number appears in the window title.

Figure 8b (right) The Cataloging client window title bar, with MARC views maximized. The record number appears in square brackets.



6. At this point, the record is not yet stored in Voyager. Other actions that occur with the import include:
  - The 003 and 001 of the original record will be combined into a new 035 field.
  - Fixed fields will be accessible via the buttons in the MARC header.

You may edit the bibliographic data according to CARLI standards and local cataloging practice.

## B. Saving the imported record

1. When you have finished editing the record, select the **Save to DB** button (the sailboat icon) to save the record to the database.
2. Voyager will validate the record according to the client preferences for Validation (Options > Preferences > Validation tab). This includes tag table validation (tags, subfields, and fixed field values exist when specified), character set validation, and ISBN/ISSN validation. If the client reports errors, cancel the save and address the issues reported.
3. Voyager will attempt to match access points in the record to authority records in Voyager. The Authority Validation screen will present a list of headings used in the record. If the headings are correct, (e.g., you validated before exporting the record, or validated manually while editing) or if you will not be doing authority work immediately, select the **Continue** button to save the record.

Note: Selecting the **Close** button on this screen will cancel the save operation.

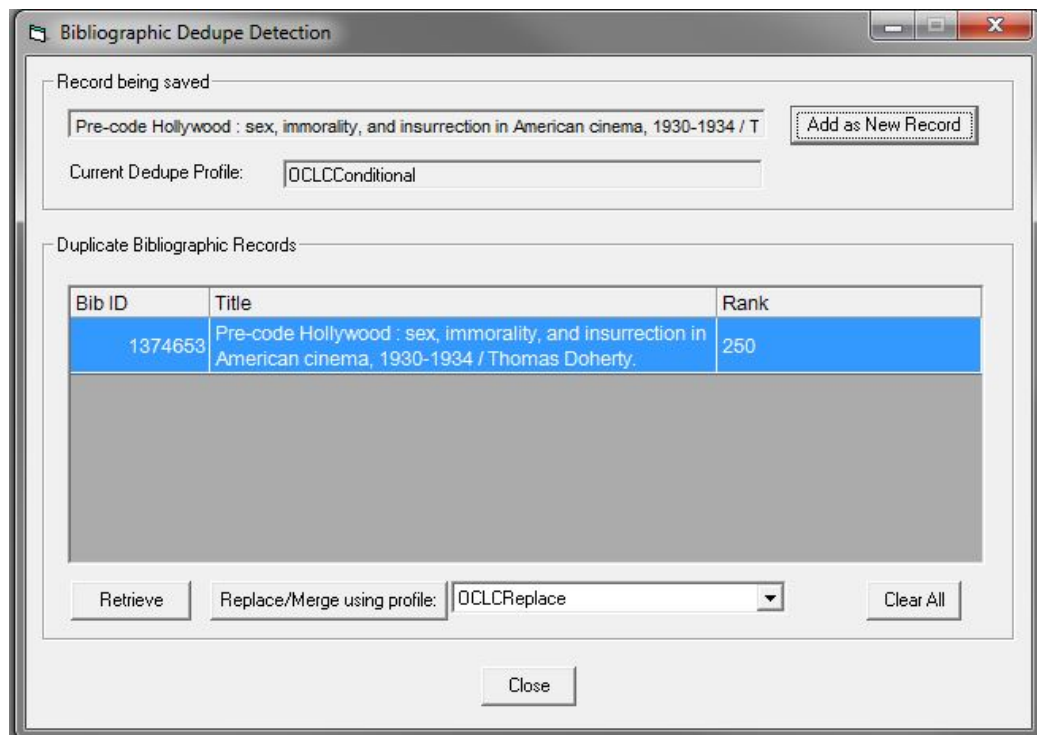


4. *If a duplicate record is detected in the database, you will see the “Bibliographic Dedupe Detection” window. (Figure 9). This window appears if any of the factors in Part 1, Section A, Step 5, add up to the warning level of the duplicate detection profile.*

A rank of 100 or more suggests a match on 035\$a, BIB\_ID, or a combination other identifiers. A rank of less than 100 suggests that one or more identifiers in the imported record (e.g., ISBN, ISSN, or LCCN) match with a record already in Voyager.

The best practice at this point is to select the records in the list, and then select **Retrieve** to review the records, unless you already planned to perform a replacement of that record.

Figure 9. The Bibliographic Dedupe Detection window. Note that the default button on this screen is **Add as New Record**. If you press the <Enter> key while on this screen, you will add the record, and possibly create a duplicate in your database. Be sure to intentionally select the button you need. Selecting **Retrieve** will display the selected duplicate record from the local database and cancel the save. Selecting **Close** will cancel the save only.



- If the Rank is less than 100, select **Retrieve** to view the duplicate records, then review where the matches occurred. For examples, records may represent different works, or different expressions of the same work, that have the same ISBN or ISSN or other numbers in both records. Once you are sure the records do not represent the same resource, select **Add as a New Record**.
- If the rank is 100 or greater, and the window shows only one duplicate record, and you have verified that the imported record should replace the existing record, click **Replace/Merge using profile: OCLC Replace**.



Do not replace a bib record that does not match on the OCLC record number, which is listed in the 035 field of the duplicate bib. This will cause problems in the I-Share Universal Catalog (UC).

If multiple duplicate records are listed, you must be sure to highlight the record to be replaced. Voyager cannot replace more than one matching record at a time.

- c. If you are unsure whether to add a new record or replace an existing one, select the **Close** button, and review the records further before repeating the **Save to DB** action.