Catalog Management menu Importing and Adding MARC Records:

Main Menu/Back Office

Circulation Management
Circulate, Manage Circulation Periods & Calendars

Create Labels
Print Barcode, Spine Labels & ID Cards

Borrower Management
Add/Edit/Delete, Import & Manage Patron Groups

Advanced Settings
Manage Master settings, Printers, & Program Users

Catalog Management
Add, Manage or Import cataloged records, create Multiple Collections
Quickly add MARC records - Easy ISBN Cataloging & Pick & Pull Cataloging
Add Book Cover Images and Hyper-links
Perform Physical Inventory of Holdings

G4 Stay up-to-date
Program Notes & Tips

Reports Management
Utilize existing or create custom Circulation, Catalog, Borrower, & Analysis Reports

Help
Redirect to Web based help documentation

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Import MARC 21 Records:

To import Marc records or records descriptions contained within a spreadsheet; select Catalog Management, next select the Import/Export menu item. The library program automatically defaults to the Import MARC Records; this option provides a standard interface for the importing of book orders using the MARC 21 Format for Holdings Data: 852. MARC Records are required to have a file formatted in a MARC.mrc or Microlif.001 format.

Create collection records from a Spreadsheet:

The second method of adding records to the library system is by using data contained within a standard spreadsheet file. The program has the ability to allow data held within spreadsheet columns to be identified visually and then assigned to MARC Tags and Subfields for import. Having knowledge of the MARC Record format is important. This option provides an expedient time saving method to add already created information into readable and usable MARC data. LRMS will assist any library with this process.

Catalog Management/Importing MARC Records:

Catalog Menu

Basic Functions

Select Import/Export

Search/Edit Catalog

Import/Export

Easy ISBN Cataloging
Instantly Search & Catalog MARC records
Using LRMS and numerous
Z39.50 data bases by ISBN number

Inventory

Labels & Cards

Pick and Pull
Alternate MARC Record Search & Cataloging
by Title, Author, Subject, Keyword & Number
Limited Data Base Search

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LRMS provides multiple methods of retrieving and entering MARC records into the library system:

- *Import records using a Disc provided from a vendor.*
- *Import records using a Flash/Thumb Drive.*
- *Import records that have been downloaded as a file from a vendor site.*
- *Import records downloaded directly to the library program using the most popular Hyperlinked Vendor icons located upon the library program desktop. These icons are updated as other vendors are requested or emerge. When utilized this link provides a direct connection to the vendor order/ record download login site.*
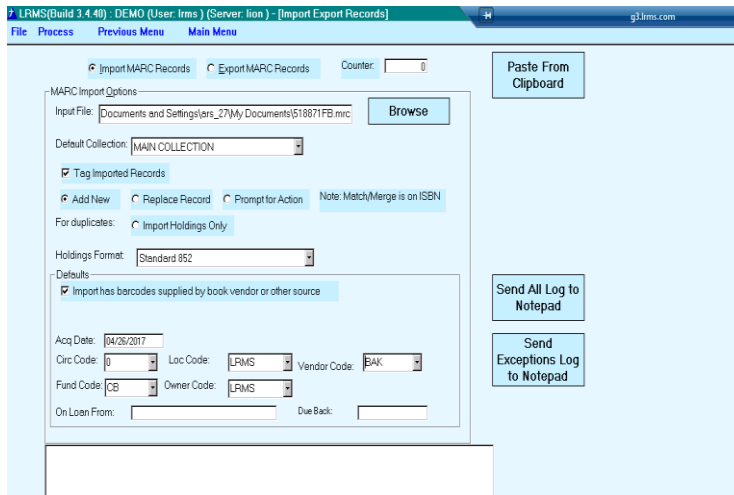- *Import Records using a spreadsheet CSV file.*

Import MARC Record Screen Display explanation:

Import Records
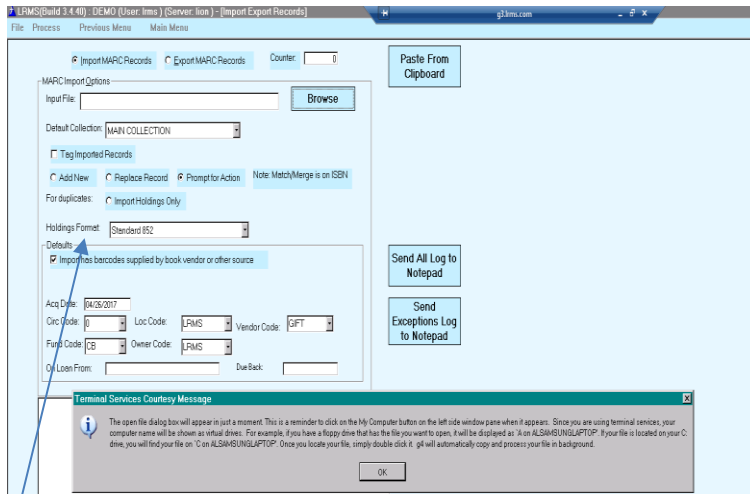
This message appears to identify local workstation hard drives, flash drives, etc.

Import a MARC file:

Video Help for Importing MARC (.mrc or microlif) files Click Here contains audio.

MARC records can be a file located on a Disc, Flash/Thumb Drive, or can be a downloaded file from a vendor source. The Terminal Services Courtesy Message describes how to identify the various locations for retrieving the file to be imported.

Our recommendation is to utilize the Icons that are available on the library program desktop that link to the various Book Vendor sources where the book order can be accessed and downloaded and save to the "My Documents or My G4/G3 Files" folder.

Once the file to be imported is located; simply by using the mouse double click the file and the program will automatically place the file name within the Input File are of the Import display.

Select the "Default Collection" Pick the collection from the list and complete the various options, once you have reviewed your selections you are ready to select the "Process" menu item to "Start Import". The "Cancel" option will stop the import.

Import record Tips: Request your book vendor to provide multiple import files when the order contains Reference Books or items that will not be circulated and will use a different Circ Code.

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Defaults:

- <u>Import has barcodes supplied by book vendor or other source</u> = this option is defaulted because most vendor MARC records does include the 852 Holdings.
  - o <u>Unchecking this default allows</u> an Import that does not contain the 852 Holdings to be added using the next overall unused barcode number by auto numbering the incoming records.
- <u>Acq Date:</u> = Defaults to the date of import but can be set to any date 00/00/0000.
- <u>Codes Entry</u> = Holding codes are picked for each code field; these <u>will be retained</u> and can be changed.
- <u>On Loan From & Due Back:</u> this option allows for the identification of materials on loan from a source and when it is to terminate circulation usage.
- <u>Send All Log to Notepad</u> = as records are imported the displayed information can be sent to the Notepad after the import has completed.
- <u>Send Exceptions log to Notepad</u> = should any exception occur during import this information can be sent to the notepad after the import has completed.
- <u>Paste from Clipboard</u> = this is an option that is used if the import is added from a spreadsheet or ASCII file.

MARC Import Options:

- *Counter = Display the imported record count.*
- *Process Menu item = "Start Import and Cancel" import.*
- *Input File: locate the MARC record file to be imported by use of the Browse button.*
- *Default Collection = select the collection to where the MARC record import is to go.*
- *Tag Imported Records = Each record added is tagged with a Green colored pin* .
- *Add New = each record Imported will be added as a "New" single Title.*
- *Replace Record = each record added will be matched by ISBN number and will overwrite any match with the incoming record.*
- *Prompt for Action = When an incoming record is a match both records will be displayed allowing for a manual selection of adding a record.*
- *For Duplicates/ Import Holdings Only = using the ISBN number and a match is found this option only the incoming records 852 Holdings is added to the existing record increasing the number of copies.*
- *Holdings Format = Standard 852 is defaulted as most to all imports will require this standard.*

Importing MARC Records that "do not"
Have Holdings/Copies information:

Importing MARC records that do not contain an assigned Barcode number or Holdings/Copies information is easily accomplished by changing a **Defaults** value within the lower portion of the Import screen. (as circled)

Add MARC records that do not contain a Barcode or Holdings

Uncheck Import has barcodes supplied by book vendor or other source. The library program will automatically find the next available unused barcode number and automatically assign this number as the starting number for this import. Remember to complete the addition of the Holdings/Copies information (Ie. Circ Code, Loc Code, etc.)

The Acq (Acquisition) Date defaults to the date of importing any record, this date can be manually altered before continuing the Import process. The other Holding fields can be selected by means of the drop-down arrow. The program will remember these entries and will display them upon the next import, simply make adjustments as necessary for each import.

Importing book records that are created within
an .CSV Spreadsheet file

Another method of adding books and materials to the library database is to create a structured spreadsheet that is saved as a .CSV file. The library program has a very useful option within the Import/Export menu option known as "Paste from Clipboard".

Using this method does require the use and understanding of applying MARC tag and Sub-field information headers to each column of information contained within the created spreadsheet. This information is vital and required to the structure of an import using this option.

This structuring is dependent upon the Cataloging Template that was created for the different materials being kept within your G4 program. This program can be used to manage most any type of item and all that is needed is to create a custom cataloging template using the MARC standards that suites the item to be cataloged. (Examples: various book items, magazines, equipment, tablet computers, laptop computers and various attachments; all of which can be cataloged and circulated using the G4 program.) As an example of specialty items: (Mobile Media Collection – Equipment Template showing a Chromebook)

Cataloging Template

Record view showing use of the template

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The following example illustrates importing book materials, the only difference between a book and a specialty item is the design of the custom cataloging template and the assignment of what MARC Tags and Subfield are used within the template for adding the details of the item being cataloged. When a different template is being used the MARC tags and subfields used are to be substituted to match the specialized templates.

Book Template example: showing Tags and Subfields descriptions.

The spreadsheet that follows is a book import. Note: LRMS does offer a cost service where large quantities of items require addition as specialty items, we do the work needed and this is based upon an hourly cost of $85.00/hour with guaranteed results.

Book Import Example:

Spreadsheet Data does require a MARC Tag and Sub-field Header Row to describe each Column of information, This is va very important part of importing data from this spreadsheet.

How to Import book records using the above spreadsheet example.

The data contained within the spreadsheet requires all Rows and Columns to be highlighted for the copying to the clipboard of the workstation being used for any import.

Highlight the Columns and Rows to be added as new records, once highlighted perform the COPY function, this will place this data into the Clipboard and making this information available for the Importing function.

Once the information has been copied and the MARC Import Options have been setup, click the "**Paste from Clipboard**" button to begin the Import process.

This part of importing requires the use of the first row of the spreadsheet that contains the MARC record Tag and Sub-Field descriptions. Within the accompanying video the program will present how the "Table list" of the copied file and its first row of MARC descriptions are to be used to set up the import structure. This video is more detailed showing how to apply what is needed for a successful import.

Importing from a Spreadsheet format:

How this works: (This does require patience when performing this task)

The first column items are to be clicked upon and assigned using the Table that appears as a 0ne to One or One to Many (this is why the spreadsheet requires identification of each column listing by a MARC tag and Sub-field which would include the ***barcode number column identified as 852p and the Cost of an item within the cost column with the MARC tag 8529 for importing..***

How to Import using data from a spreadsheet. 15-minute Video Help Link

Once the records have been added to their collection, there are a few final steps needed to add the Holding Codes to allow for proper circulation and location. This is accomplished using the G4 Catalog Management "Mass Update" option.

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Mass Update:

This section of the G4 program has many uses for performing large additions or changes to cataloged records. Using this option and for best results we recommend using the Tagged record option that pin points the exact records to be modified using the various options of the Mass Update process.

To Add or Change a Circ Code: