

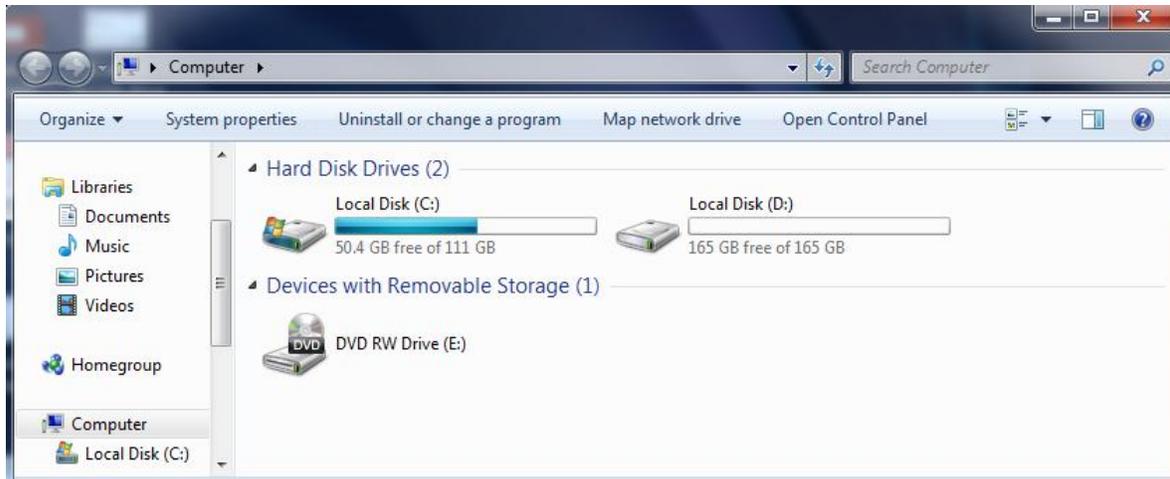


LRMS Hosted Services Importing and Exporting MARC Records:

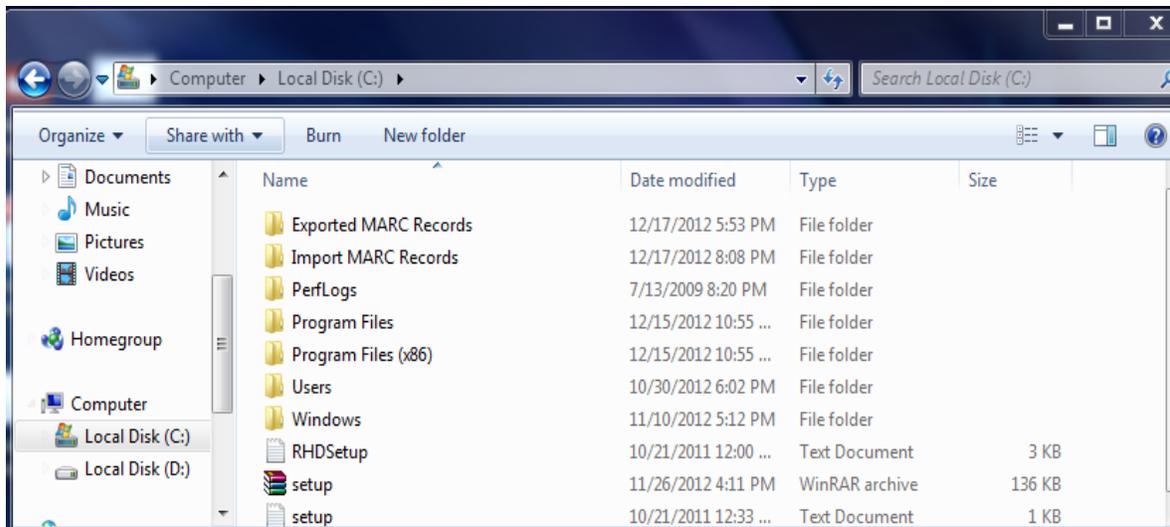
The purpose of this document is to provide step-by-step instructions for Exporting or Importing MARC records.

Local Workstation - Import/Export setup configuration

First begin by adding two folders to your workstations C drive, this can be accomplished by accessing the My Computer



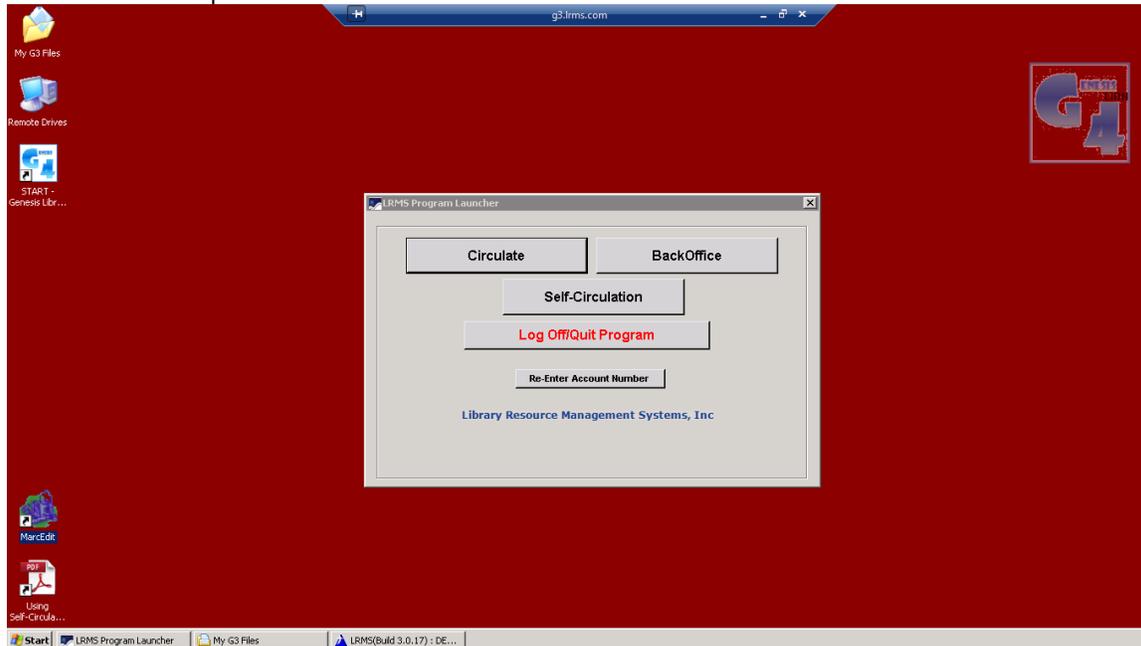
1. My Computer/Computer View, select the Local Disk (C:)



2. Create two new folders, one named "Exported MARC Records" and the other named "Import MARC Records".
 - a. Export MARC Records - This is where you will copy your export records to from the G4 Desktop "My Files" folder.
 - b. Import MARC Records - You will copy or add your vendor MARC records to this folder.
 - a. To create a Folder, simply use your mouse and click the Right Mouse button and select "New" from the menu. You will need to be viewing the Local Disk (C:) to add folders this way.



Hosted LRMS Desktop Screen View:



Catalog Management

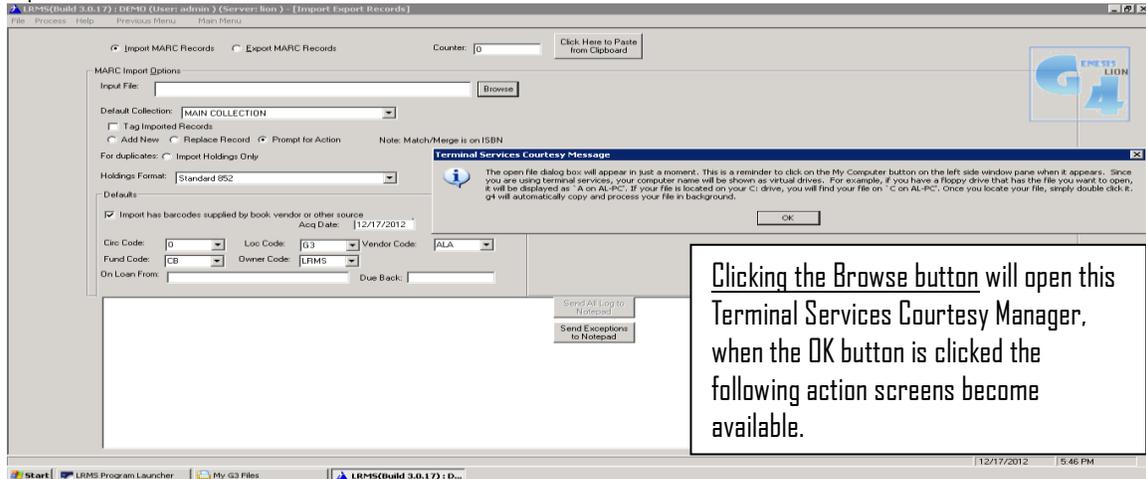
1. Importing Records

An Importing or Exporting of MARC record is accomplished using the G4 BackOffice/Main Menu and then selecting the Catalog Management menu, and picking the MARC Import/Export menu, select from your options.

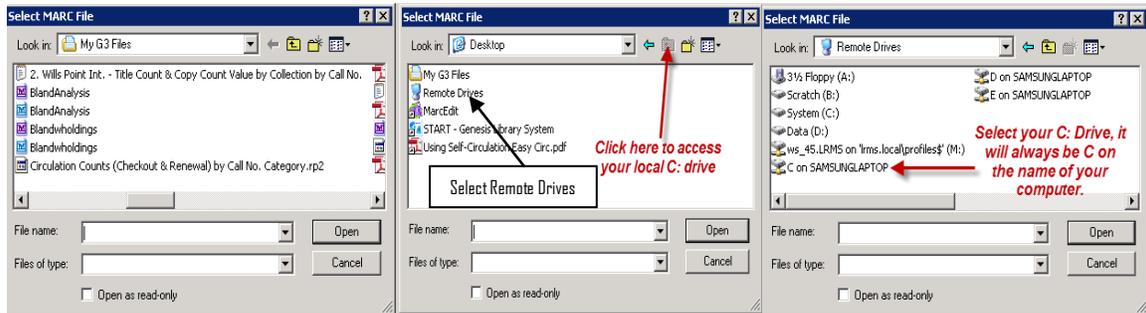
- a. Importing MARC records requires a different approach and is required because of an Access Control by the local computer Operating System. Start by accessing the My Computer or Computer menu from your PC's Desktop, then open your Local Disk C Drive and make a folder name it "Import MARC Records". This folder will be used to retain New MARC records that were received from a Vendor or MARC record corrective source.



Import Screen View

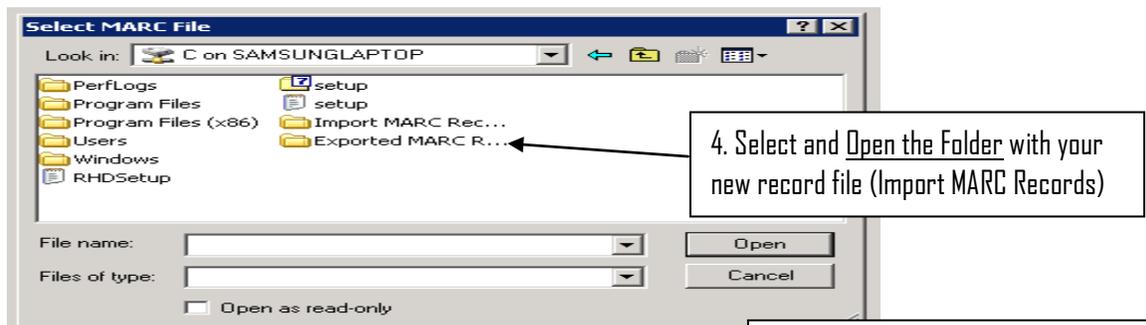


Browse Button - Action Screens



1. Open File Dialog Box
2. Select Remote Drives - Open View for C: Drive
3. Remote Drives - Locate your C: Drive

- b. When the file (for Import) is from a vendor and has been delivered to you through the Internet (this is not on a Disk or CD Disc file) it can usually be saved to a Folder on your C: hard drive. Wherever you have placed this file it can be copied and then pasted into the "Import MARC Records" folder. (If you cannot see or find your local C: drive as shown in Example 3, it is a probability that your connection configuration requires setup)

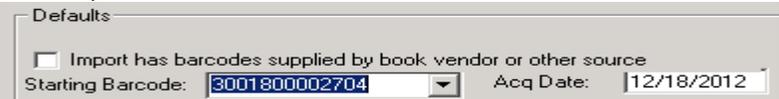


5. Once you have located your Import file click to Highlight it and click the Open button or Double click the File. The program will add it to the Input File Description Field.

Importing Records - *continued*

Setup your Import preferences

1. ✓ **Add your file** to the Import File field
2. ✓ **Select the Collection** you want to Import into
3. ✓ **Use the Tag Records** feature when Importing, it helps to locate your records after Import and is also helpful should you need to print Collection labels for these Items.
4. ✓ Depending upon the reason you are importing records, make a selection to "Add New or to use Replace Record"
 - a. **Add New** creates a new MARC record, if your file to import contains the 852 tag information such as a Bar Code number; G4 will add the bar code number along with the rest of the Holdings Information that you select.
 - b. **Replace Record** will replace a current record within the collection you are importing too provided that the record being imported and the record it is to replace both have identical **ISBN numbers**.
 - c. **Prompt for Action** when chosen provides a view based upon ISBN number matches of the incoming record to one found within the collection. This allows you to review the match records by displaying both items and provides the ability to manage how you want the incoming record to be added.
5. **For Duplicates – Add Holdings Only**; when this option is selected the Import again uses the ISBN number to make a match for adding holdings.
6. ✓ **Holdings Format** – Use the Standard 852 format
7. **Defaults** (
 - a. **Import has barcodes supplied by Book Vendor or Other Source**, this option is "Defaulted" to the on state because most book orders are purchased with pre-assigned barcode numbers and a certain amount of Holdings information.
 - b. **Uncheck this box if your records do not contain any Bar code number** and the program will provide the Next available System/Collection bar code number.


 - c. **Acq (Acquisition) Date**: the program uses the day of current date that the records are being imported, this date can be changed by simply highlighting the displayed and typing in a new date.
8. **Selecting Holding Information Codes**: These codes are usually predetermined and listed within Maintain Holdings Codes; always add and select your code from the drop-menu to avoid typos. However if it is necessary - you can add a new code on the fly by typing in the code and later adding the description to Maintain Holding Codes.
 - a. **Circ Code**: represents the code that best suites the items being imported.
 - i. (When placing material orders it is best to request separate import files for unlike materials, example Regular Book material for general circulation verses Reference books or Media materials that would be given a different **Circ Code**.)
 - b. **Loc Code**: this code often represents the library building location; it can represent a more detailed location like a section and shelf or another building location.
 - c. **Vendor Code**: this code is self-explanatory, it represents where or who the items were received from.
 - d. **Fund Code**: represents where the funds came from for the purchase of these items.
 - e. **Owner Code**: represents who owns these materials.
 - f. **On Loan From**: use this when these records being Import are on Loan this is a description to identify an Agency or Entity that has loan materials to your library.
 - i. **Due Back**: this field is used to set the last day Items on Loan should be checked out against.
9. **Start the Import**: Click on the "Process" option in the upper left corner of the Import screen.

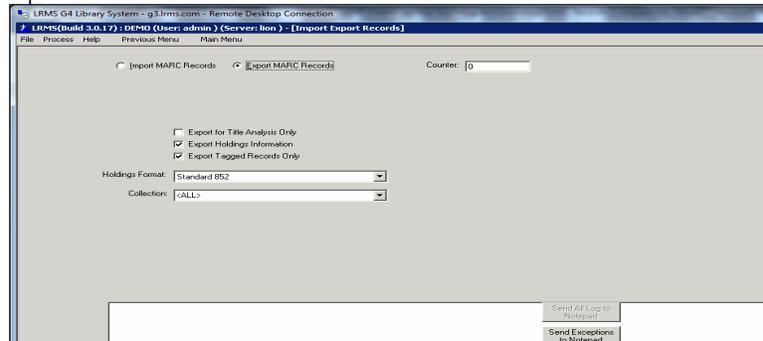


- a. Click the "Process" button and select Cancel to stop the Import.

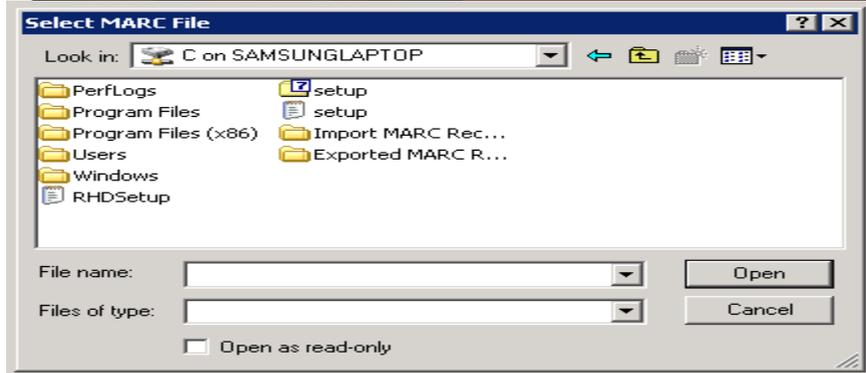
Export MARC Records:

1. Exporting records from G4 has three distinct methods
 - a. Export for Analysis Only
 - b. Export Holdings Information
 - c. Export Tagged Records

Export Screen



2. **Export for Analysis Only** – this Option is used when a Library wants to send a copy of their collection to a service source for evaluation of aging, proper number of items in a category. Typically this is a service (to name a few) performed by Mackin’s Book Service, Follett’s Book Service and others.
 - a. G4 also has a report that will provide an Analysis of your collection ageing, quantities, circulation statistics and more, Reports Management/Circulation Reporting/Circulation/Holdings Analysis.
3. **Export Holdings Information** – this Option is used when the export is to include a complete record with its Holdings as a part of the record.
4. **Export Tagged Records Only** – this Option allows for only certain records to be exported and is based upon “Record Tagging”. Having the ability to tag specific items or categories allows for services to be performed against these records that have been exported using this option.
5. When MARC records are being Exported;
 - a. To move an Exported file from the “My Files” folder is a simple “Copy and Paste” function. Reference Page 3 of this document for more detail.
6. When an Exported file is in the “My Files” folder, copy it and then minimize your G4 Hosterd session this will expose your G4 Desktop where you will see an Icon for “Remote Drives” find your computer’s C: Drive and the appropriate folder to Paste this file into.
 - a. If you do not see your Local Hard Drives when viewing through the Remote drives, it is a probability that your G4 Connection RDP connection is not setup properly. Close your session by Logoff Function.
 - b. Use this document, [view page number 4](#) for instruction.
 - a. [Hosted Service - Connection & Printing Instructions](#)



- If you are not familiar with how to "Copy and Paste", it is done using the Mouse and the Right Mouse button. Placing the mouse pointer on the file that is to be copied and clicking the Right Mouse button once a Menu will open; look for the word "Copy" and click on it. Now the copied file is in computer memory and can be placed anywhere you want to place it by simply using the Right Mouse button again and this time selecting the word "Paste".