

OPEN SOURCE ILS SOFTWARE

KOHA

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- **Cataloging Guides**
 - **Bibliographic Record Cataloging Cheat Sheet**
 - **Item/Holdings Record Cataloging Guide**
 - **Handling On Order Items and Holds**
- **Importing MARC records**
- **Managed Staged MARC Records Tool**

CATALOGING

Cataloging Guides

Bibliographic Record Cataloging Cheat Sheet

- ***The information in this table can be used for migration or importing data purposes required by Koha.***
 - **This table required for circulation**

Table-5.1: Cataloging Guide (page 118 of Koha 3.4 manuals)

Table-5.1: Cataloging Guide (page 367 of Koha 3.10 manuals)

Item/Holdings Record Cataloging Guide

- ***The information in this table can be used for migration or importing data purposes required by Koha.***
 - **This table required by Koha**

Table-5.2: Koha Embedded Holdings Data (page 123 of Koha 3.4 manuals)

Table-5.2: Koha Embedded Holdings Data (page 368 of Koha 3.10 manuals)

Cataloging Guides ...

Handling On Order Items and Holds

- *For import MARC records when you have ordered the book (as opposed to when you receive the books).*
- *And allow patrons to place holds on those books, you may need to add item records to the *.mrc file before importing.*
- *The easiest way to import your latest order is to first run your records through MARCEdit.*
 - *Download your MARC records, saving them to your desktop or some other location.*
 - *Open MARC records in MARCEdit.*

Cataloging Guides ...

Handling On Order Items and Holds

This tutorial was written with MARCEdit version 5.2.3769.41641 on Windows XP, instructions may be different if your version or operating system is different.

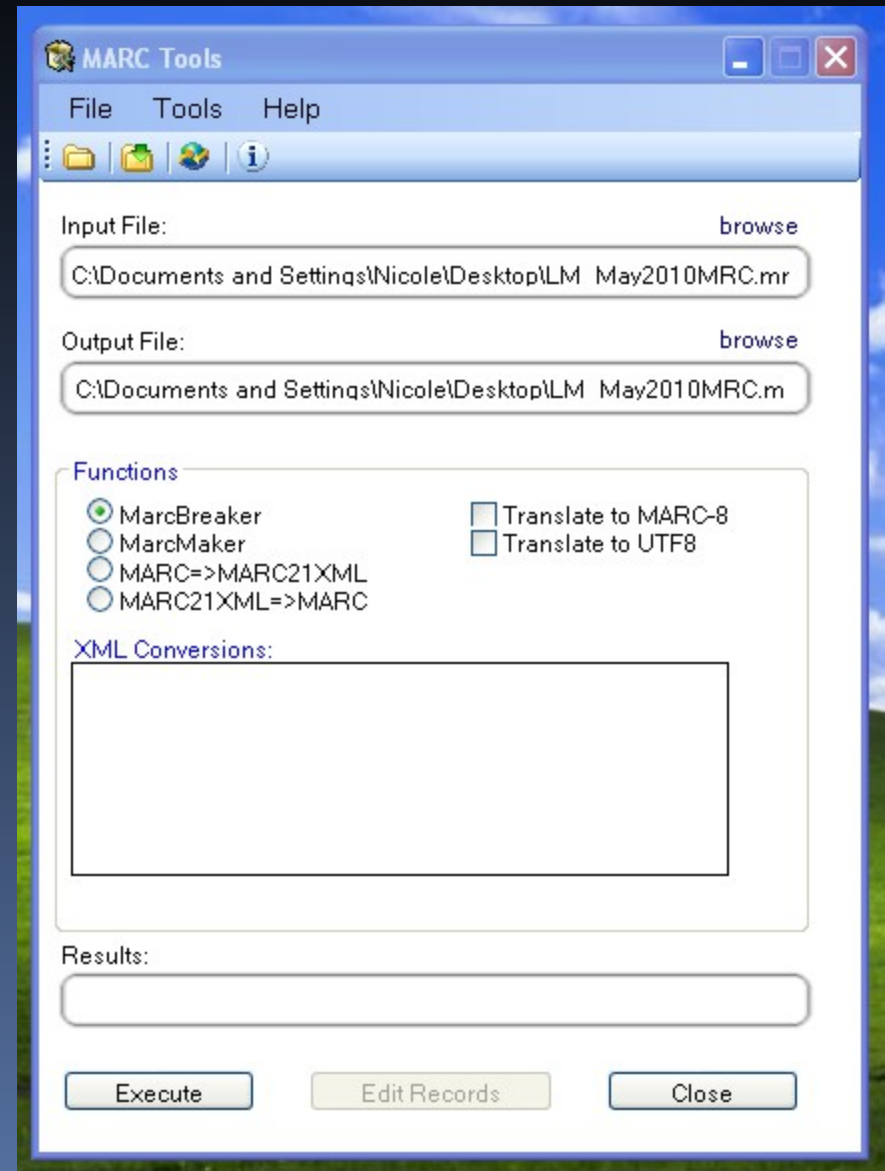
- **Original file will automatically be in the input**
- **Ensure MarcBreaker is chosen**
- **And then click "Execute"**

Cataloging Guides ...

Handling On Order Items and Holds

.....

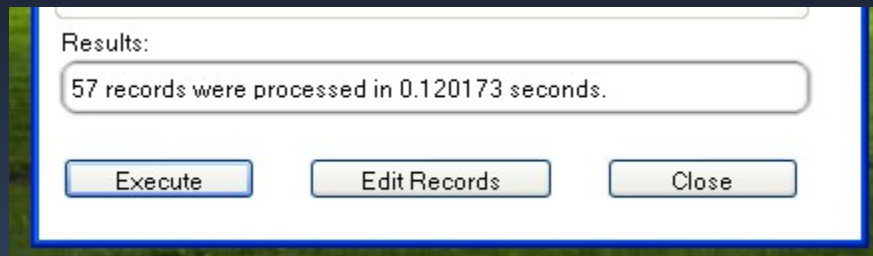
- Original file will automatically be in the input



Cataloging Guides ...

Handling On Order Items and Holds

- You will be presented with a summary of the records processed at the bottom of the screen.

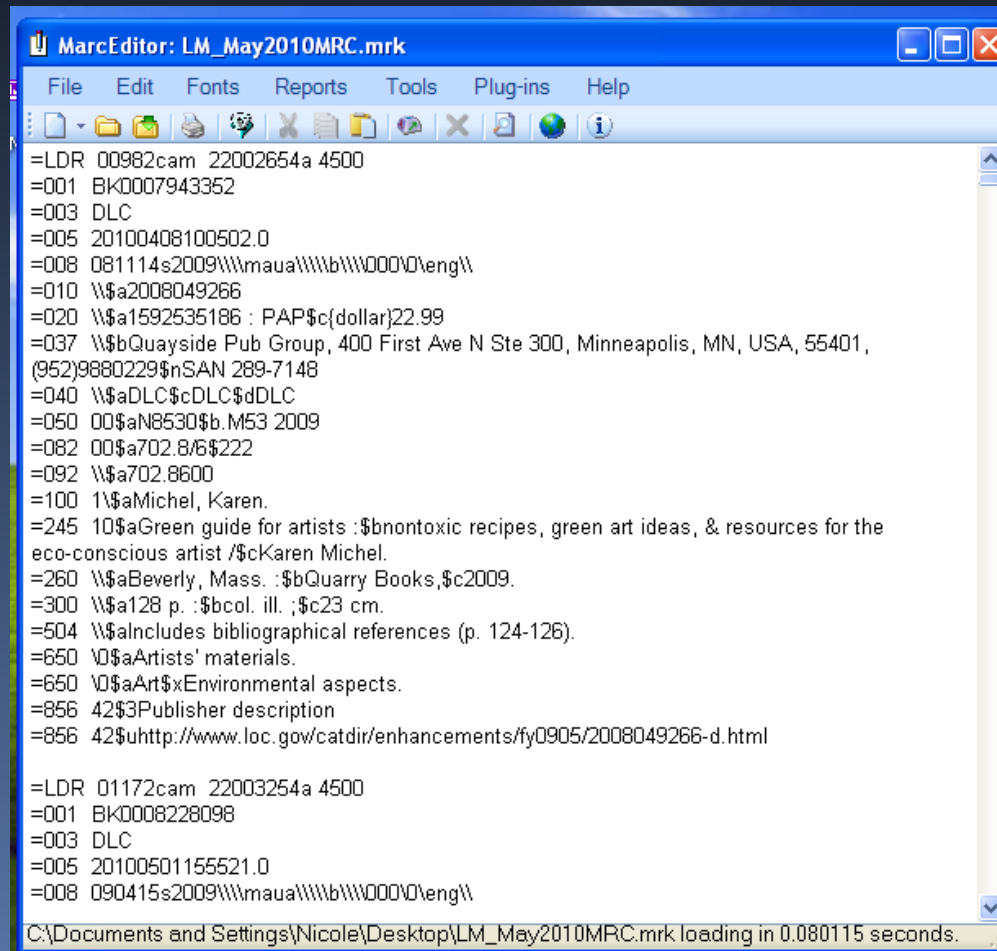


- Click 'Edit Records' to continue on to adding item records

Cataloging Guides ...

Handling On Order Items and Holds

- Your screen will be replaced with a larger screen containing the MARC records.



The screenshot shows a window titled "MarcEditor: LM_May2010MRC.mrk" with a menu bar (File, Edit, Fonts, Reports, Tools, Plug-ins, Help) and a toolbar. The main text area contains MARC records for two items. The first record is for a book by Karen Michel, and the second is for a book by Quarry Books. The status bar at the bottom indicates the file is loading in 0.080115 seconds.

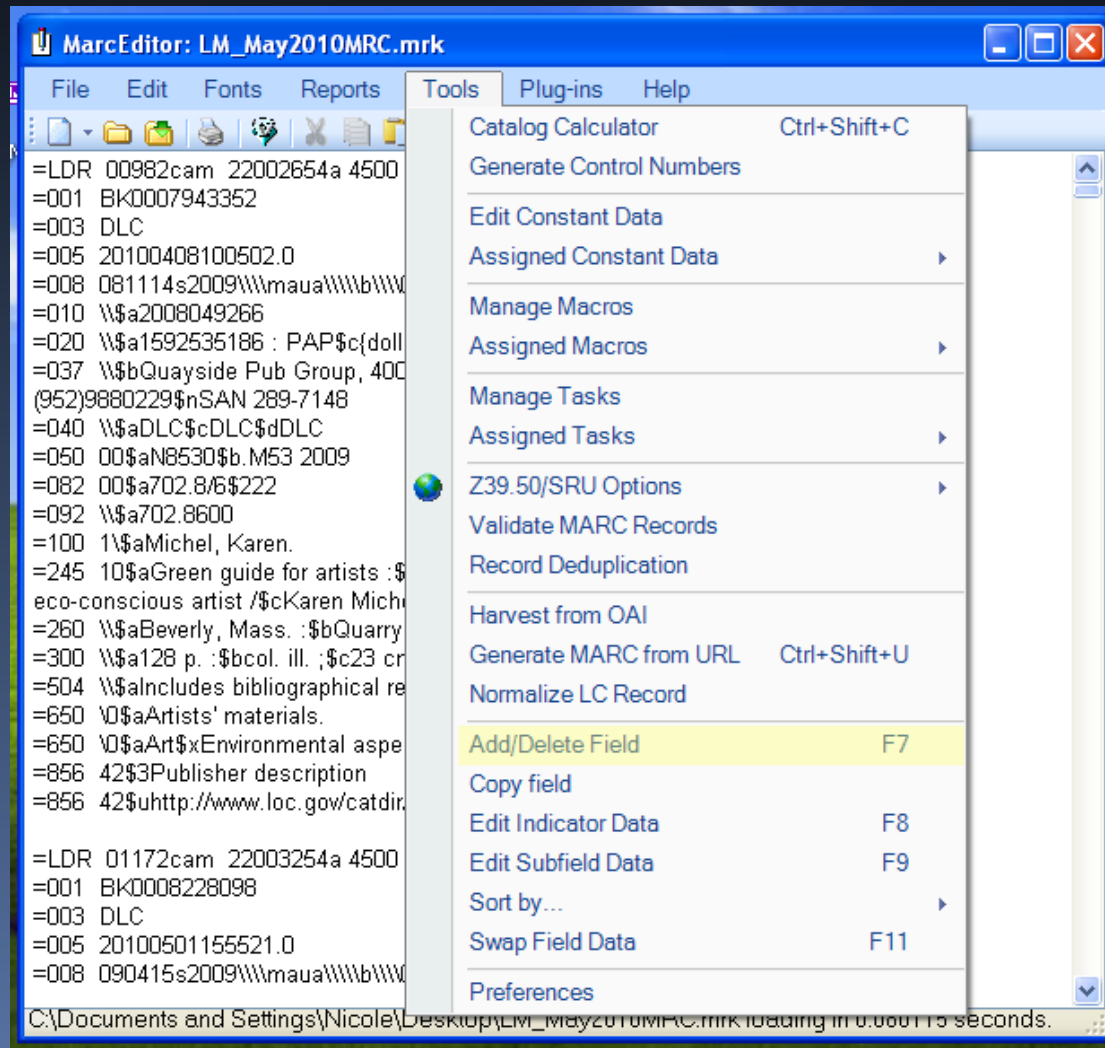
```
MarcEditor: LM_May2010MRC.mrk
File Edit Fonts Reports Tools Plug-ins Help
=LDR 00982cam 22002654a 4500
=001 BK0007943352
=003 DLC
=005 20100408100502.0
=008 081114s2009\\maua\\b\\0000\\eng\\
=010 \\$a2008049266
=020 \\$a1592535186 : PAP$c(dollar)22.99
=037 \\$bQuayside Pub Group, 400 First Ave N Ste 300, Minneapolis, MN, USA, 55401,
(952)9880229$nSAN 289-7148
=040 \\$aDLC$cDLC$dDLC
=050 00$aN8530$b.M53 2009
=082 00$a702.8/6$222
=092 \\$a702.8600
=100 1\\$aMichel, Karen.
=245 10$aGreen guide for artists :$bnontoxic recipes, green art ideas, & resources for the
eco-conscious artist /$cKaren Michel.
=260 \\$aBeverly, Mass. :$bQuarry Books,$c2009.
=300 \\$a128 p. :$bcol. ill. ;$c23 cm.
=504 \\$alincludes bibliographical references (p. 124-126).
=650 0$aArtists' materials.
=650 0$aArt$xEnvironmental aspects.
=856 42$3Publisher description
=856 42$uhttp://www.loc.gov/catdir/enhancements/fy0905/2008049266-d.html

=LDR 01172cam 22003254a 4500
=001 BK0008228098
=003 DLC
=005 20100501155521.0
=008 090415s2009\\maua\\b\\0000\\eng\\
C:\Documents and Settings\Nicole\Desktop\LM_May2010MRC.mrk loading in 0.080115 seconds.
```


Cataloging Guides ...

Handling On Order Items and Holds

- Click on Tools > Add/Edit Field



Cataloging Guides ...

Handling On Order Items and Holds

- Enter in the Koha specific item info

MarcEdit.NET Batch Editing Tools

Add/Delete Field Utility

Field: 942 Field Data: \\\$cBOOK

Search Options:

- Match case
- Insert before
- Insert last
- Add field only if not present
- Use Regular Expression
- Remove Duplicate Data

Delete Field Add Field Close

- In the Field box, type 942
- In the Field Data box, type \\\$c and the item type code (\\\$cBOOK in this example)
- Check the 'Insert last' option
- Click 'Add Field'

Cataloging Guides ...

Handling On Order Items and Holds

- Enter in the item record data

The screenshot shows a software window titled "MarcEdit.NET Batch Editing Tools" with a sub-window titled "Add/Delete Field Utility". On the left is a blue sidebar with menu items: "Add/Delete Field", "Copy Field Data", "Edit Indicators", "Edit Subfield Data", and "Swap Fields". The main area contains a "Field:" dropdown menu set to "952" and a "Field Data:" text box containing "\$7-1\$aCPL\$bCPL\$cNEW\$eB". Below these are "Search Options:" with checkboxes for "Match case", "Insert before", "Insert last" (checked), "Add field only if not present", "Use Regular Expression", and "Remove Duplicate Data". On the right are three buttons: "Delete Field", "Add Field", and "Close".

- In the Field box, type 952
- In the Field Data box, type
\$7ORDERED_STATUS\$aPERM_LOC\$bCURR_LOC\$cSHELVING_LOCATION\$eSO
URCE_
continued on next page

Cataloging Guides ...

Handling On Order Items and Holds

**ex. \$7-1\$aCPL\$bCPL\$cNEW\$eBrodart\$yBOOK.*

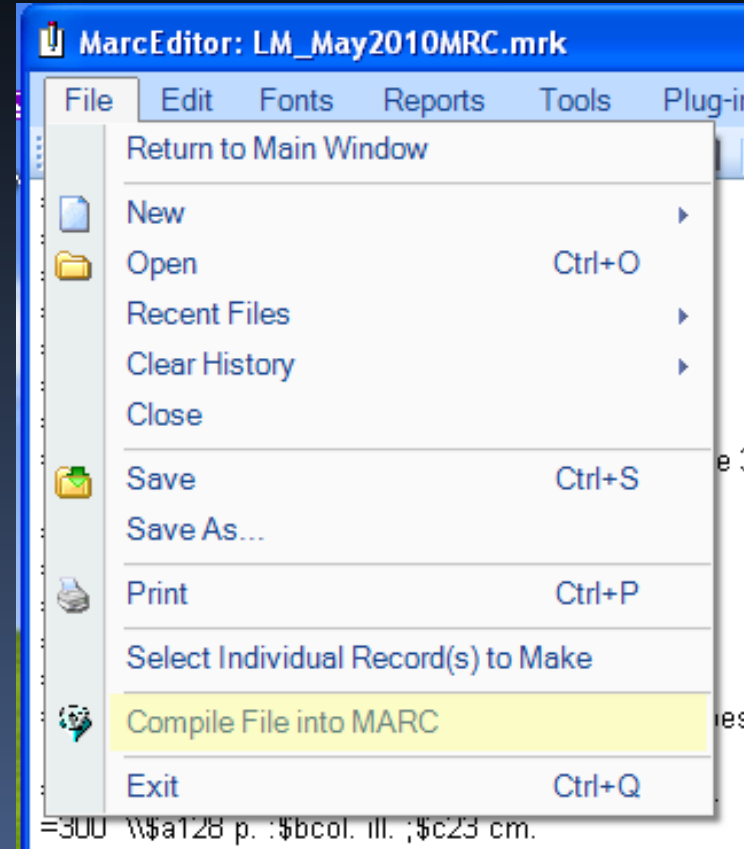
- In a default install of Koha -1 is the value for the Ordered status*
 - * You may want to look at other subfields you would like data in -- for example, changing the collection code to put all the items in the same collection (8), automatically fill in the acquisition date (d), or put in a public note (z).*
 - * Be sure you use the \$ to separate subfields; adding each subfield on a separate line will cause that many items to be imported with your MARC record (in the example above, four items, each with one of those subfields corrected).*
 - * Make sure you look at the Administration > Authorized Values in Koha to put the correct code into the field.*
-
- Check the 'Insert last' option*
 - Click 'Add Field'*

Cataloging Guides ...

Handling On Order Items and Holds

- Close the field editor window
- Click on File > Compile into MARC

- Choose where to save your file



Cataloging Guides ...

Handling On Order Items and Holds

- *Now you want to go into your Koha system and follow the instructions for importing MARC records.*
- *Once the item has come in, you will need to go to the item record and individually change the item to have the correct barcode, and manually change the status from Ordered to the blank line in the Not for Loan field.*

Note:

- *If you purchase your cataloged item records, you may want to request your vendor put in the information you need into the MARC records for your library.*
- *You could import the edited-by-the-vendor file, overwriting the current record, automatically replacing the data with what you need.*

Importing MARC records

This tool can be used to import both bibliographic and authority records that are saved in MARC format.

Get there: More > Tools > Catalog > Stage MARC records for import

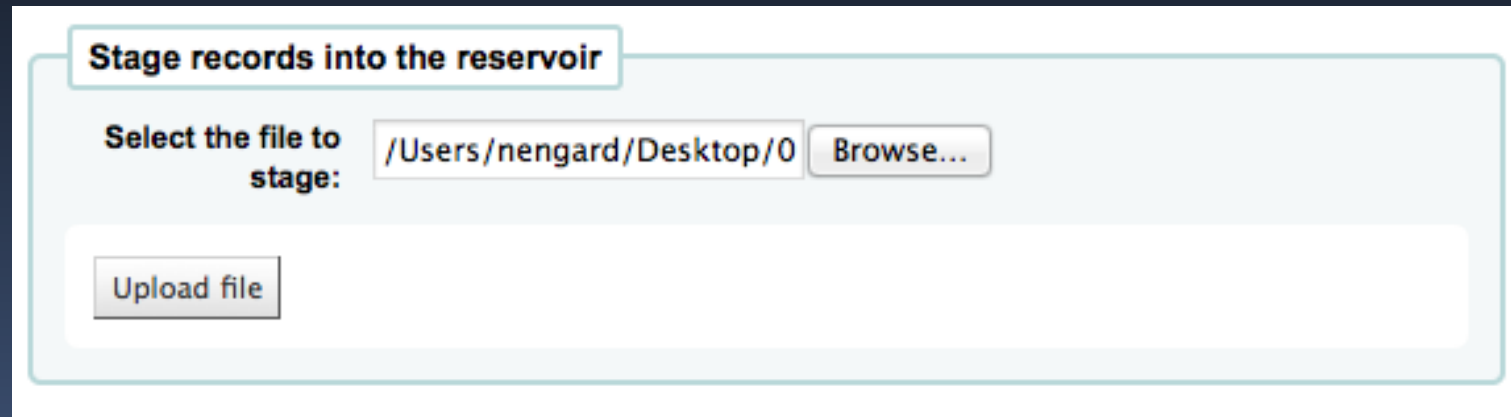
Importing records into Koha includes two steps:

- 1. The first is to stage records for import*
- 2. Secon is Managed Staged MARC Records Tool*

Importing MARC records ...

Stage records for import

- *First find the MARC file on your computer*



The screenshot shows a web interface for staging records. At the top, there is a tab labeled "Stage records into the reservoir". Below the tab, the text "Select the file to stage:" is followed by a text input field containing the path "/Users/nengard/Desktop/0" and a "Browse..." button. Below this, there is a large, empty rectangular area, and at the bottom left of this area is an "Upload file" button.


Importing MARC records ...

Stage records for import

- Next you will be presented with options for record matching and item imports

Stage records into the reservoir

Select the file to stage:

Upload progress:

100%

Comments about this file:

Record type:

Character encoding:

Look for existing records in catalog?

Record matching rule:

Action if matching record found:

Action if no match is found:

Check for embedded item record data?

Yes
 No

How to process items:

Importing MARC records ...

Stage records for import

- Enter '*Comments about this file*' to identify your upload when going to the '*Manage Staged MARC Records*' tool
- Tell Koha which type of file this is, bibliographic or authority
- Choose the character encoding
- Choose whether or not you want to look for matching records
(You can set up record matching rules through the administration area)

Record type: Bibliographic

Character encoding: Authority

Character encoding: UTF-8 (Default)

for existing

rd matching rule:

- UTF-8 (Default)
- MARC 8
- ISO 5426
- ISO 6937
- ISO 8859-1
- EUC-KR

Look for existing records in catalog?

Record matching rule: Do not look for matching records

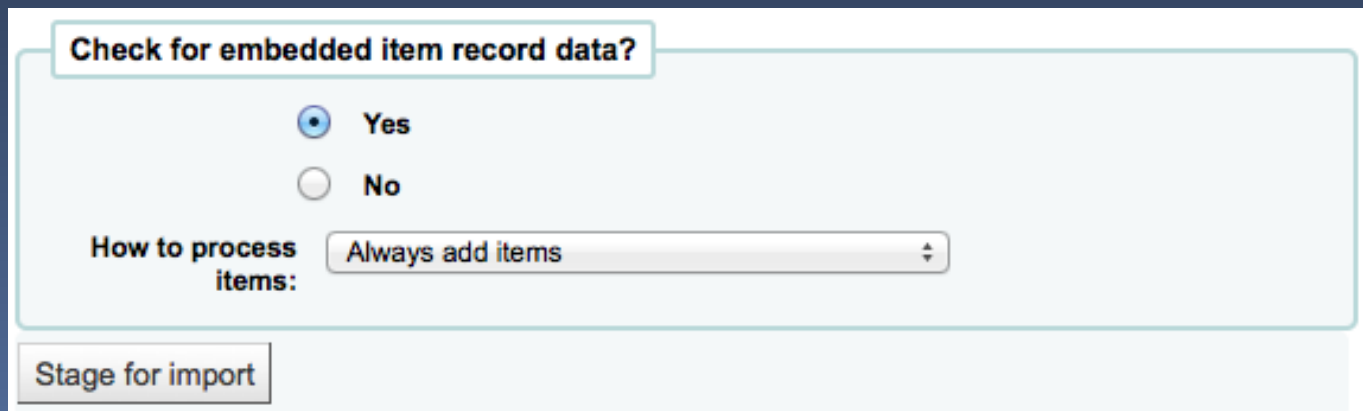
Action if matching record found: Replace existing record with incoming record

Action if no match is found: Add incoming record

Importing MARC records ...

Stage records for import

- Next choose what to do with matching records if they are found
- Finally choose what to do with records that are unique
- Next you can choose whether or not to import the item data found in the MARC records (if the file you're loading is a bibliographic file)



Check for embedded item record data?

Yes
 No

How to process items: Always add items

Stage for import

The screenshot shows a dialog box with a title bar "Check for embedded item record data?". Inside, there are two radio buttons: "Yes" (selected) and "No". Below that is a label "How to process items:" followed by a dropdown menu showing "Always add items". At the bottom left is a button labeled "Stage for import".

Importing MARC records ...

Stage records for import

- *Click 'Stage for import'*
- *You will be presented with a confirmation of your MARC import*

Stage MARC Records For Import

MARC Staging results :

- 200 records in file
- 0 records not staged because of MARC error
- 200 records staged
- 116 records with at least one match in catalog per matching rule "ISBN"
- 263 item records found and staged
- [Manage staged records](#)
- [Back](#)

- *To complete the process continue to the **Managed Staged MARC Records Tool***

Importing MARC records ...

Staged MARC Record Management

Get there: More > Tools > Catalog > Staged MARC Record Management

Once we have staged your records for import we can complete the import using this tool.

Manage Staged MARC Records

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
9	koha.mrc		staged	2009-11-24 08:40:48	200	263 (Create Label Batch)	<input type="button" value="Clean"/>
8	bib-684.marc8		imported	2009-10-20 13:16:17	1	1 (Create Label Batch)	<input type="button" value="Clean"/>
7	koha(3).mrc		cleaned	2009-08-18 16:18:26	94	125 (Create Label Batch)	
6	koha(2).mrc		cleaned	2009-08-18 16:15:57	43	43 (Create Label Batch)	
5	koha.mrc		cleaned	2009-08-18 16:14:33	1000	1113 (Create Label Batch)	

Importing MARC records ...

Staged MARC Record Management

- **From the list of staged records, click on the file name that you want to finish importing.**
 - You will note that records that have already been imported will say so under 'Status'
- **A summary of your import will appear along with the option to change your matching rules.**

File name: bib-3.utf8

Comments:

Staged: 2011-03-17 21:21:55

Status: staged

Matching rule applied:

Action if matching record found:

Action if no match found:

Item processing:

Importing MARC records ...

Staged MARC Record Management

- Below the summary is the option to import the batch of bib records using a specific framework.

Import this batch into the catalog

Add new bibliographic records into this framework: Default

#	Citation	Status	Match?
1	Korean-English Dictionary	staged	no_match

Default
Books, Booklets, Workbooks
Audio Cassettes, CDs
Kits
Fast Add Framework
Binders
Models
CD-ROMs, DVD-ROMs, General Online Resources
DVDs, VHS
Serials

- Choosing a framework other than 'Default' isn't necessary, but it's helpful for running reports and having the right bib level item type selected on import.

Importing MARC records ...

Staged MARC Record Management

- Below the framework selection there will be a list of the records that will be imported.

Page 1 2 3 4 5 6 7 8

#	Citation	Status	Match?	Bib
1	Library mashups : (9781573873727)	staged	auto_match	
	Matches biblio 2 (score = 1000): Library mashups :			
2	Library mashups : (9781573873727)	staged	auto_match	
	Matches biblio 2 (score = 1000): Library mashups :			
3	Winslow Homer watercolors, Hoopes, Donelson F.	staged	no_match	
4	The encyclopedia of the biological sciences. Gray, Peter.	staged	no_match	
5	Year of fear; Mechanicus, Philip.	staged	no_match	
6	A history of medical psychology Zilboorg, Gregory.	staged	no_match	
7	Understanding the Old Testament Anderson, Bernhard W.	staged	no_match	
8	Philo of Alexandria : Sandmel, Samuel. (0195025148)	staged	auto_match	
	Matches biblio 8 (score = 1000): Philo of Alexandria : Sandmel, Samuel.			
9	The changing metropolis, McKeown, James E. (0395112311)	staged	auto_match	
	Matches biblio 9 (score = 1000): The changing metropolis, McKeown, James E.			
10	Becoming partners; marriage and its alternatives, Rogers, Carl R.	staged	no_match	

- Review your summary before completing your import to make sure that your matching rule worked and that the records appear as you expect them to

Importing MARC records ...

Staged MARC Record Management

- Click 'Import into catalog' to complete the import.

Undo import into catalog

Completed import of records

Number of records added	84
Number of records updated	0
Number of records ignored	116
Number of items added	260
Number of items ignored because of duplicate barcode	3

Page 1 [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#)

#	Citation	Status	Match?	Bib
1	Library mashups : (9781573873727)	ignored	match_applied	2
	Matches biblio 2 (score = 1000): Library mashups :			
2	Library mashups : (9781573873727)	ignored	match_applied	2
	Matches biblio 2 (score = 1000): Library mashups :			
3	Winslow Homer watercolors, Hoopes, Donelson F.	imported	no_match	1272
4	The encyclopedia of the biological sciences. Gray, Peter.	imported	no_match	1273
5	Year of fear; Mechanicus, Philip.	imported	no_match	1274
6	A history of medical psychology Zilboorg, Gregory.	imported	no_match	1275
7	Understanding the Old Testament Anderson, Bernhard W.	imported	no_match	1276

- Once your import is complete a link to the new bib records will appear to the right of each title that was imported.

Importing MARC records ...

Staged MARC Record Management

- Records imported using this tool remain in the 'reservoir' until they are cleaned.
- These items will appear when searching the catalog from the Cataloging tool:

⊕ New Record ▾ 🔍 z39.50 Search

1 result(s) found in catalog, [3 result\(s\) found in reservoir](#)

Title	Location	preview		
Embracing insanity : Pavlicek, Russell C. - 0672319896 - SAMS, - 2000 ; Indianapolis, IN : - ix, 176 p. ; ; 23 cm.		MARC Card	Edit biblio	Add holdings

Biblios in reservoir

Title	ISBN	Date	Edition	coming from	preview	
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio
Embracing insanity : Pavlicek, Russell C.	0672319896			z3950.loc.gov	MARC Card	Add biblio

Importing MARC records ...

Staged MARC Record Management

To clean items out of the 'reservoir':

- Visit the main screen of the Manage Staged MARC Records tool.

Manage Staged MARC Records

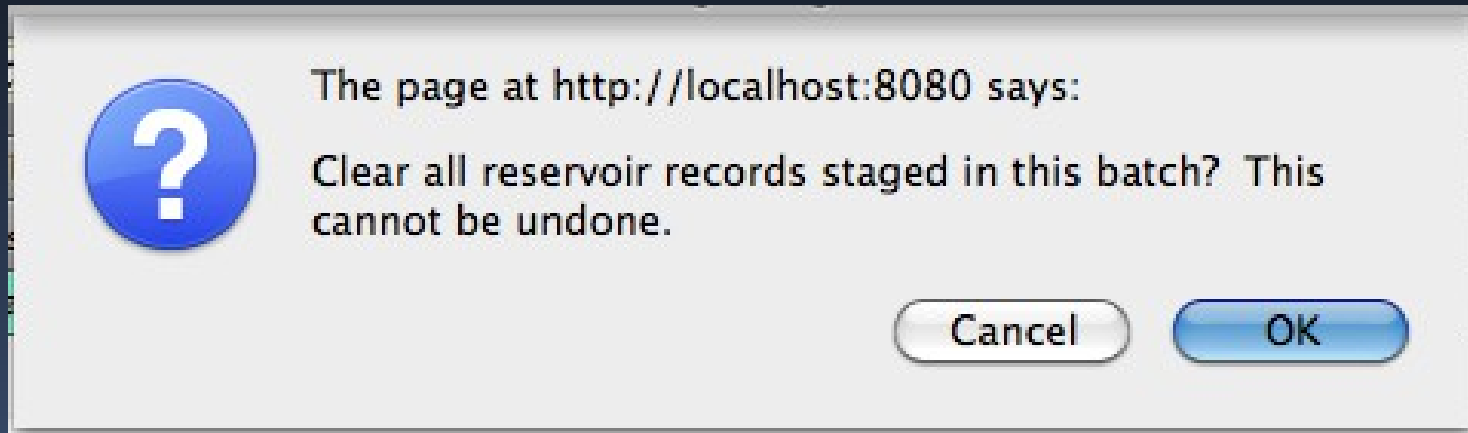
#	File name	Comments	Status	Staged	# Bibs	# Items	Action
9	koha.mrc		staged	2009-11-24 08:40:48	200	263 (Create Label Batch)	<input type="button" value="Clean"/>
8	bib-684.marc8		imported	2009-10-20 13:16:17	1	1 (Create Label Batch)	<input type="button" value="Clean"/>
7	koha(3).mrc		cleaned	2009-08-18 16:18:26	94	125 (Create Label Batch)	
6	koha(2).mrc		cleaned	2009-08-18 16:15:57	43	43 (Create Label Batch)	
5	koha.mrc		cleaned	2009-08-18 16:14:33	1000	1113 (Create Label Batch)	

- To clean a batch, click the 'Clean' button to the right

Importing MARC records ...

Staged MARC Record Management

- ***You will be presented with a confirmation message***



- **Accept the deletion and the records will be removed from the reservoir and the status will be changed to 'cleaned'**



Thanks