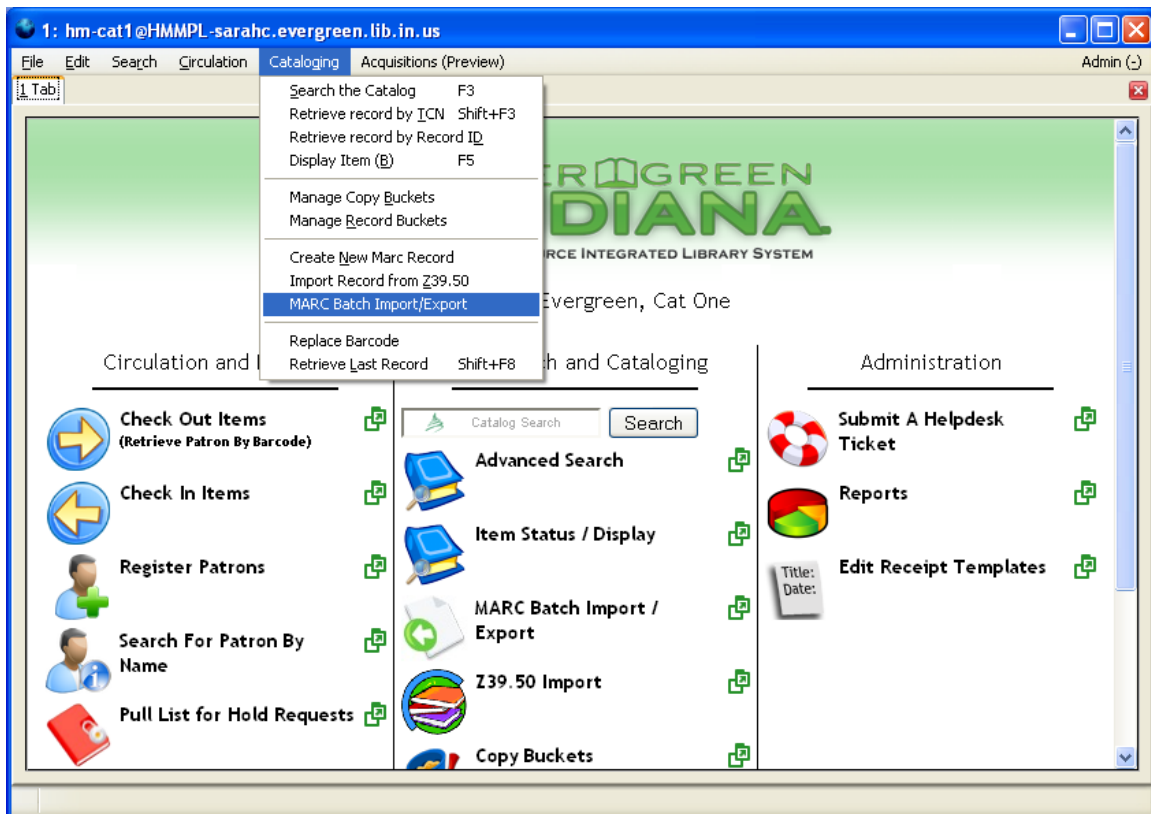


Chapter 24 -- Batch Import/Export Tool

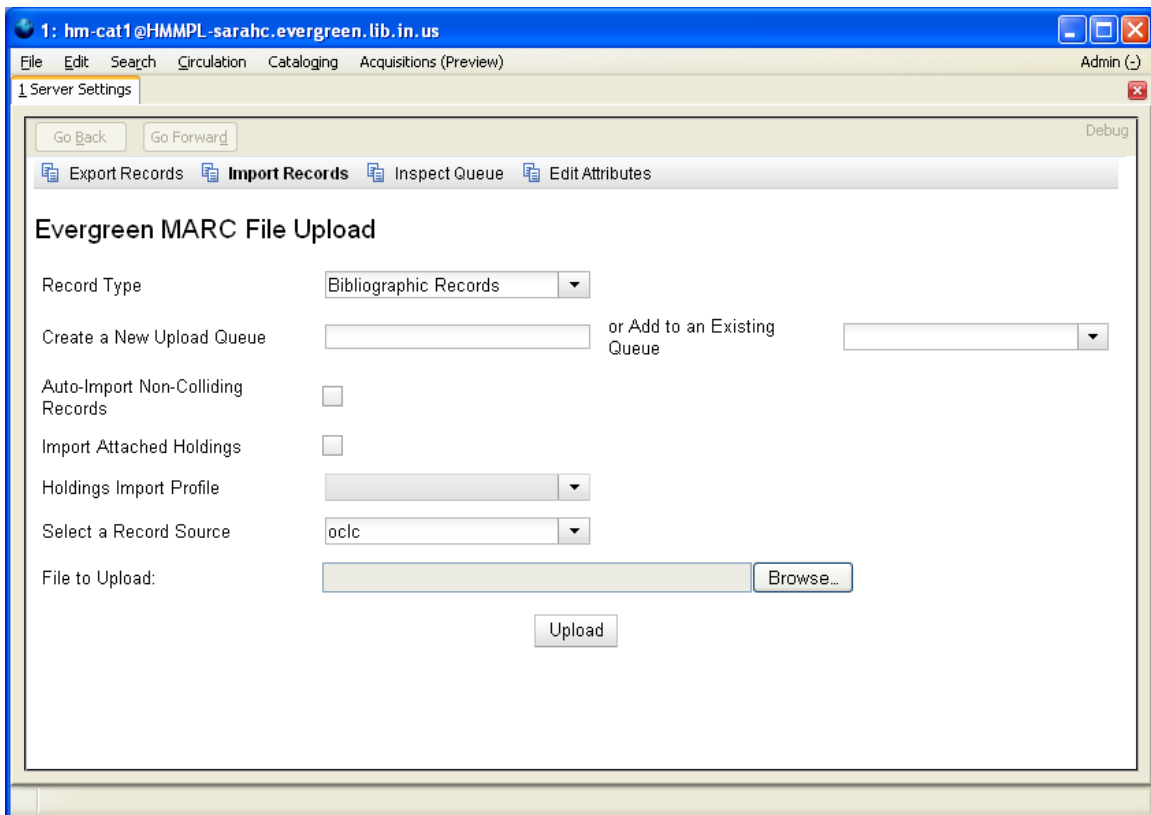
Importing Records via Batch without Auto-Import

NOTE: The Batch Importer is not completely developed for Version 1.6. Many of the features simply do not work, and some may have bugs. This documentation is accurate as of the date Last Updated, however results with different features may be inconsistent and subject to change. Please feel free to contact Sarah Childs at sarahc@zionsville.lib.in.us if your results differ from those documented here, and I will see if I can replicate your results at that time.

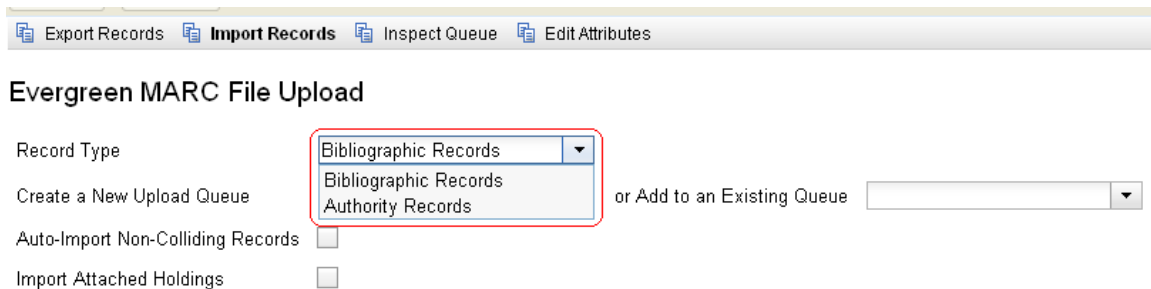
To access the Batch Import/Export tool, sometimes known as Vandelay, click on the **MARC Batch Import / Export** icon on the splash screen, or go to the **Cataloging** menu (**Alt + G**) on the top menu bar and select **MARC Batch Import / Export**.



The Import Records screen display. Note that the tab is labeled “Server Settings.”



The first choice on the Import Records screen is record type. The drop-down list offers the choice of Bibliographic or Authority Records:



NOTE: Currently, the Import Authority Records function does not work Evergreen Indiana, so choose only Bibliographic Records.

To import a batch of bibliographic records, first you will choose or create your Upload Queue. The Upload Queue is a lot like a bucket where you can review the records you are importing.

If you have not created an Upload Queue, simply type a name for the Queue in the **Create a New Upload Queue** box:

Evergreen MARC File Upload

Record Type

Create a New Upload Queue or Add to an Existing Queue

Auto-Import Non-Colliding Records

Or, if you have previously created an Upload Queue and you would like to add the records to that queue, you can select it from the drop-down list:

Evergreen MARC File Upload

Record Type

Create a New Upload Queue or Add to an Existing Queue

Auto-Import Non-Colliding Records

NOTE: If you do not create or select an upload queue an unnamed queue is created for you by default. It appears as a blank line at the top of the drop-down list for Existing queues, as seen above. Any new batches with no queue selected will be added to the unnamed queue.

The Auto-Import Non-Colliding Records box allows you to import records directly into the catalog, without reviewing them in the Upload Queue first. For more information on Auto-Import see **Importing Records via Batch with Auto-Import** on page 24.15.

Auto-Import Non-Colliding Records

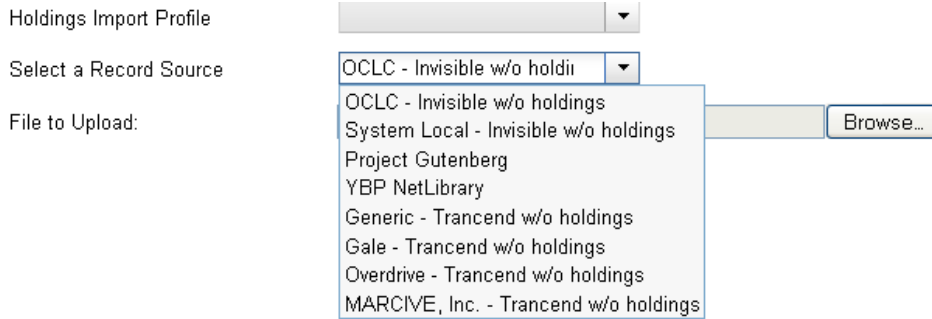
Import Attached Holdings

Holdings Import Profile

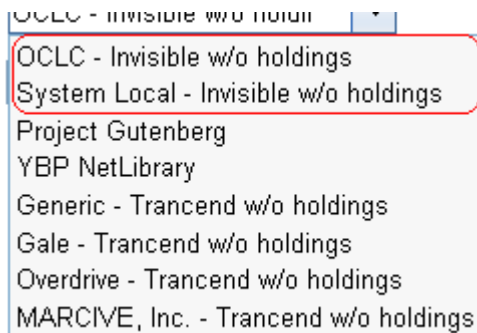
*NOTE: In version 1.6, you must auto-import non-colliding records to import attached holdings. See **Importing Records with Attached Holdings** On page 24.21 for information on Import Attached Holdings and Holdings Import Profile.*

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There are several options on the **Select a Record Source** drop down list. The main distinction to be aware of are the different “Invisible w/o holdings” and “Tracend w/o holdings” options.

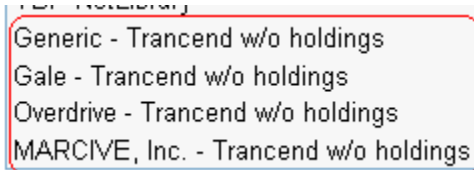


For any records where you will be adding your holdings with an item record, use the “Invisible w/o holdings” options. If your record source is OCLC, select that option, and if you use another record source, choose “System Local.”

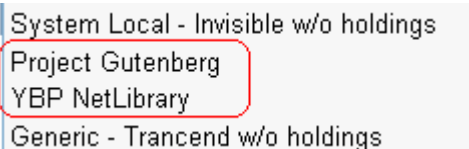
NOTE: These options are called “Invisible w/o holdings” because records you batch import with “Invisible w/o holdings” options

will not be visible in the OPAC until you add your holdings to the records. They will still be visible in the in the staff client. Once you add your holdings, the records will be visible to everyone.

Use the “Tracend w/o holdings” options for records for electronic items that will have no holdings attached, and will be accessed via the internet. If your record provider is listed, choose that option, otherwise use “Generic –Tracend w/o holdings”



NOTE: When you select options that say “Tracend w/o holdings” the records will be visible to everyone, both OPAC and staff client users. Using this option will also prevent your records from disappearing when the database is stripped of empty records.



The other two options, Project Gutenberg and YBP Netlibrary are used by the State Library for loading record for e-books from INSPIRE.

Once you've selected an Upload Queue and the appropriate Record Source, you will select the file of records you wish to upload. The file can come from various sources. It should be a record or set of records you have saved in MARC format. It may come from an open on-line catalog such as Prospector, or a batch of records you have received or downloaded from a vendor or bibliographic record provider. You will need to have the file saved to your computer or a network drive which you can access.

NOTE: It is important to check the catalog for the items in your batch before uploading your records, just as when you import via Z39.50. **Always check the catalog for matches before adding records to prevent duplicates.**

TIP: While you can theoretically import very large batches, the more records you have in your import file, the longer it will take to import. It is best not to try to import more than about 20 at once. Batches that are too large may stall out and fail to import. You may also find that batches import more quickly at times when the system is not as busy. Afternoon tends to be slowest.

Export Records Import Records Inspect Queue Edit Attributes

Evergreen MARC File Upload

Record Type: Bibliographic Records

Create a New Upload Queue: Juvenile DVDs or Add to an Existing Queue:

Auto-Import Non-Colliding Records:

Import Attached Holdings:

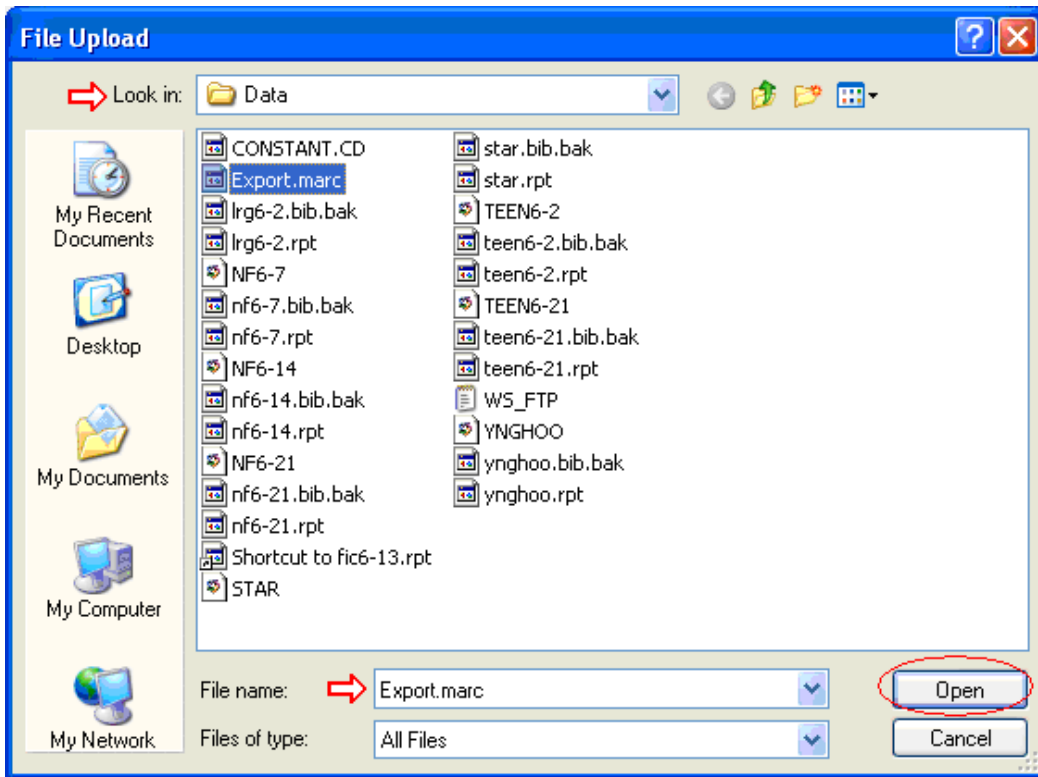
Holdings Import Profile:

Select a Record Source: oclc

File to Upload: Browse...

Upload

Click the **Browse** button. A File Upload window will open:



With Microsoft, use the Look In drop-down box to find the file you need if it is not displayed. When you have selected the file you need and it is displayed in the File Name box, click the **Open** button.

The File Upload window will close and your file should be displayed in the File to Upload box:

Export Records Import Records Inspect Queue Edit Attributes

Evergreen MARC File Upload

Record Type: Bibliographic Records

Create a New Upload Queue: Juvenile DVDs or Add to an Existing Queue: []

Auto-Import Non-Colliding Records:

Import Attached Holdings:

Holdings Import Profile: []

Select a Record Source: oclc

File to Upload: L:\OCLC\Data\Export.marc.dat [Browse...]

Upload

Click the **Upload** button. Here we are not Auto-Importing Non-Colliding records. Our records will be added to a new Upload Queue called Juvenile DVDs.

It may take a few moments for your records to display, and the following screens may display while you are waiting for the records to load:

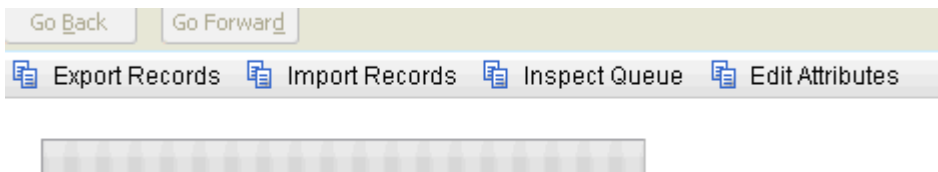


Upload Status

Uploading...

Processing... 20

The animated bar below also indicates the system is processing your request:



NOTE: Sometimes at this point the screen will freeze and it will appear that your items have not been imported. If you have waited a few minutes and nothing appears to be happening, close the Batch Importer and re-open it. You will likely find that the records now appear in your import queue. To view the Import Queue

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click on **Inspect Queue** once you've opened the Batch Loader. See **Viewing an Upload Queue** on page 24.23 for more information.

Hopefully, however, when the records have loaded, the Record Queue will display. At this point you will see a summary of the records you are importing. As long as you have not selected Auto-Import, these records have not yet been added to the catalog:

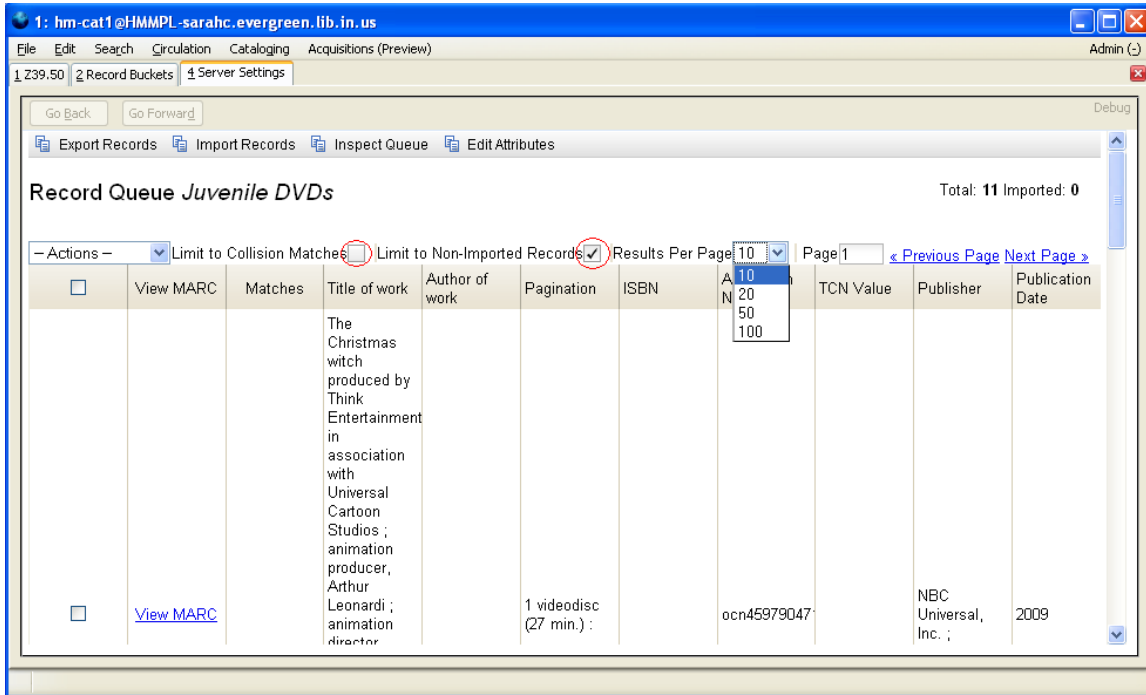
Record Queue *Juvenile DVDs* Total: 11 Imported: 0

Limit to Collision Matches Limit to Non-Imported Records Results Per Page [« Previous Page](#) [Next Page »](#)

<input type="checkbox"/>	View MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number	TCN Value	Pul
<input type="checkbox"/>	View MARC		The Christmas witch produced by Think Entertainment in association with Universal Cartoon Studios ; animation producer, Arthur Leonardi ; animation		1 videodisc (77 min) ;		ocn45979047		NB Uni

Adjusting the Upload Queue Display

You can adjust the way your results are displayed in a few ways. The screen displays 10 records at a time by default. If you wish to display more records, you can change the number of results per page with the drop down box. You can also limit the records displayed to only those with collision matches or only records which were not imported by clicking the appropriate box to select them. You can also click Previous Page and Next Page to page through your results.



You can adjust the width of the columns by clicking and dragging, and there is a column picker which allows you to change the information displayed. To access the Column Picker, right click on the column headings.

Column	Display	Auto Width
Import Time	<input type="checkbox"/>	<input type="checkbox"/>
Title of work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Author of work	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Language of work	<input type="checkbox"/>	<input type="checkbox"/>
Pagination	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ISBN	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ISSN	<input type="checkbox"/>	<input type="checkbox"/>
Price	<input type="checkbox"/>	<input type="checkbox"/>
Accession Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TCN Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TCN Source	<input type="checkbox"/>	<input type="checkbox"/>
Internal ID	<input type="checkbox"/>	<input type="checkbox"/>
Publisher	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Publication Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edition	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel Save

Only the boxes with checkmarks in them will be displayed. Click on the box to add or remove a checkmark. Click the **Save** button to display the columns you have selected, or click cancel if you do not wish to make changes.

TIP: Selecting the Auto Width box does not size the column according to the contents. If you choose one column it will be the widest. If you choose multiple columns the width of those columns will be averaged, and they will not be adjustable until you remove the auto width.

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Here columns have been selected to review and column sizes have been adjusted for ease of viewing:

View MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number	TCN Value	Publisher	Publication Date	Edition
View MARC		The Christmas witch produced by Think Entertainment in association with Universal Cartoon Studios ; animation producer, Arthur Leonardi ; animation director, Graham Morris ; live action produced and directed by Courtney B. Conte ; executive producer Shelley Duvall ; story & pictures by Steven Kellogg.		1 videodisc (27 min.) :		ocn459790471		NBC Universal, Inc. ;	2009	
View MARC		Christmas around the world Schlessinger Media ; Nancy Glass Productions ; director, Philip Tangel ; writer, Kate Youngdahl ; producer, Bette Hanson.		1 videodisc (23 min.) :	1417100249	ocm57180003		Schlessinger Media,	2004	
View MARC		Christmas Schlessinger Media ; produced by Rhonda Fabian and Jerry Baber, directed by Rhonda Fabian.		1 videodisc (25 min.) :	1417100230	ocm57351878		Schlessinger Media,	2004	
View MARC		Hanukkah/Passover Schlessinger Video Productions ; [produced and directed by Fabian-Baber Communication].		1 videodisc (ca. 23 min.) :	1417100303	ocm57301300		Schlessinger Video Productions,	19942004	
View MARC		Hanukkah/Passover Schlessinger Video Productions ; [produced and directed by Fabian-Baber Communication].		1 videodisc (ca. 23 min.) :	1417100303	ocm57301300		Schlessinger Video Productions,	19942004	
View MARC		Kwanzaa Schlessinger Media ; produced by Rhonda Fabian and Jerry Baber, directed by Rhonda Fabian.		1 videodisc (25 min.) :	141710032X	ocm57351928		Schlessinger Media,	2004	
View MARC		Toy train Christmas memories a McComas/Stachler production.		1 videodisc (3 hrs., 20 min.) :	1932291075	ocm64482188		TM Books and Video,	2003	
View MARC		Potty whispering the gentle art of infant potty training / White-Boucke Publishing Media Productions ; produced & directed by Colin White.		2 videodiscs (140 min.) :	9781888680334	ocn123799142		White-Boucke Pub.,	2006	
View MARC		I love Christmas a Tom McComas production.		1 videodisc (42 min.) :	1932291865	ocn184907773		TM Books & Video Inc.,	2008	[Rev. 2nd ed.]
View MARC		Why we love cats and dogs PBS and Thirteen WNET New York.		1 videodisc :	9781594644665	ocn463651759		Educational Broadcasting Corporation ;	2009	
View MARC		Shelley Duvall's tall tales & legends. The complete series produced by Fredric S. Fuchs, Bridget Terry ; directed by Howard Storm ; written by Gary Jacobs.		3 videodiscs (458min.) :	1417232420	ocn457072632		E1 Entertainment	2009	

NOTE: Preferred widths currently cannot be saved.

In the View MARC column is a link which allows you to look at the MARC record for the item displayed in that row.

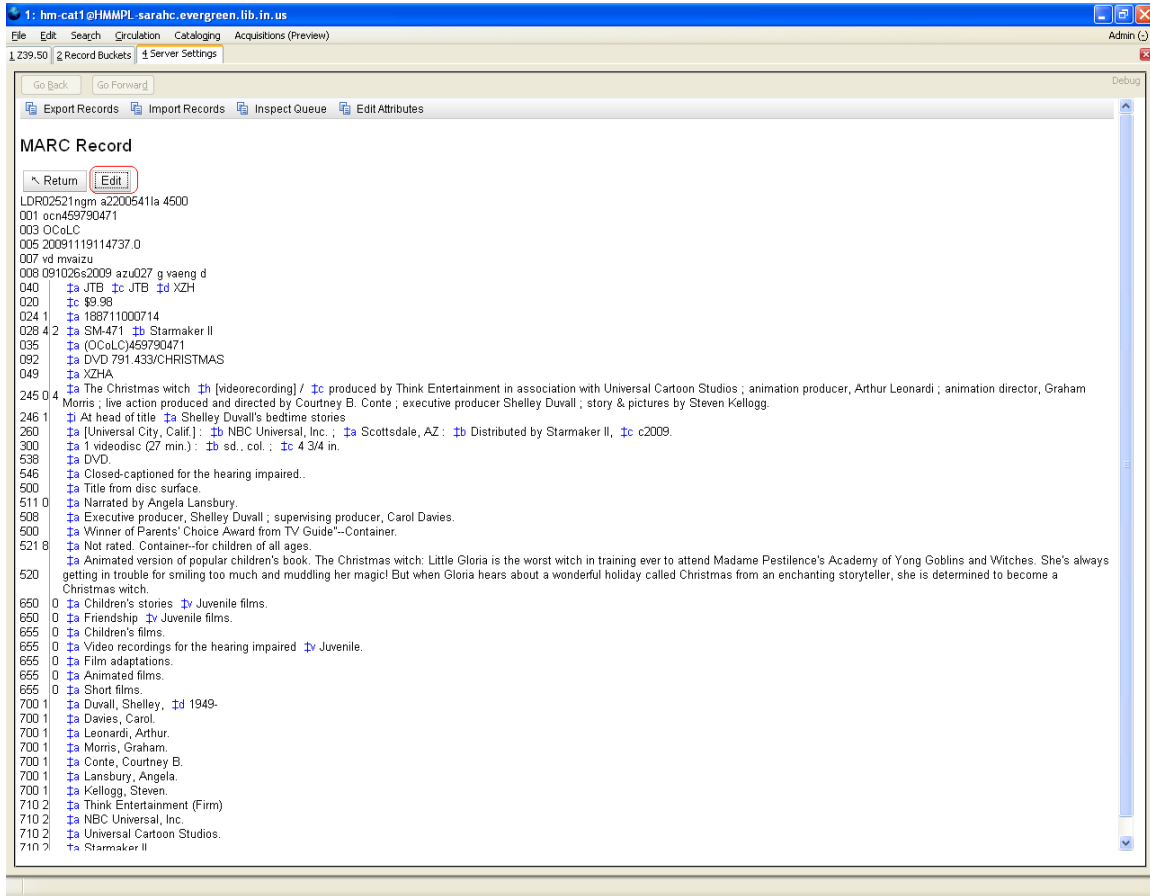
Record Queue Juvenile DVDs

View MARC	Matches	Title of work	Author of work	Pagination	ISBN	A	N
View MARC		The Christmas witch produced by Think Entertainment in association with Universal Cartoon Studios ; animation producer, Arthur Leonardi ; animation director, Graham Morris ; live action produced and directed by Courtney B. Conte ; executive producer Shelley Duvall ; story & pictures by Steven Kellogg.		1 videodisc (27 min.) :			
View MARC		Christmas around the world Schlessinger Media ; Nancy Glass Productions ; director, Philip Tangel ; writer, Kate Youngdahl ; producer, Bette Hanson.		1 videodisc (23 min.) :	1417100249		

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The MARC record will open:



NOTE: If you click the Edit button, the MARC Editor will open, but you will not be able to save any changes you make. You will get an error message saying *Permission denied.*

Uploading Records from the Upload Queue

When you are ready to import your records, you can import selected records by clicking the boxes in the left hand column to select specific records and then selecting **Import Selected** from the Actions drop-down list:

Record Queue *juv materials*

Total: 5 Imported: 4

Limit to Collision Matches Limit to Non-Imported Records Results Per Page 10 Page [Previous Page](#) [Next Page](#)

<input type="checkbox"/>	MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number	Publisher	Publication Date	Edition
<input type="checkbox"/>	View MARC	Matches	Help--my kid is driving me crazy : the 17 ways kids manipulate their parents, and what you can do about it / David Swanson.	Swanson, David, 1969-	xiii, 224 p. :	978039953526	ocn311777526	Perigee Book,	2009	1st ed.
<input checked="" type="checkbox"/>	View MARC	Matches	Tom and Jerry. Vol. 3 Hanna-Barbera Productions ; MGM Television ; Sib-Tower 12 Productions.		2 videodiscs (240 min.) :	1419850121	ocn153314846	Distributed by Warner Home Video,	2007	

Or you can import all the displayed records by selecting **Import All** from the Actions drop-down list:

[Export Records](#) [Import Records](#) [Inspect Queue](#) [Edit Attributes](#)

Record Queue *juv materials* Total: 5 Imported: 4

Limit to Collision Matches Limit to Non-Imported Records Results Per Page 10 Page 1 [Previous Page](#) [Next Page](#) [Home](#)

<input type="checkbox"/>	MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number
<input type="checkbox"/>	View MARC	Matches	Tom and Jerry. Vol. 3 Hanna-Barbera Productions ; MGM Television ; Sib-Tower 12 Productions.		2 videodiscs (240 min.) :	1419850121	ocn153314846

NOTE: *Import All does not import all the records in the Queue, rather it imports all the records on the page you are viewing. Records which have the same TCN as an existing record in the catalog will also not be imported, but records which match existing records based on ISBN will import.*

It may take a moment for your records to import, and the following bar will display while they are being processed:

[Go Back](#) [Go Forward](#)

[Export Records](#) [Import Records](#) [Inspect Queue](#) [Edit Attributes](#)

91%

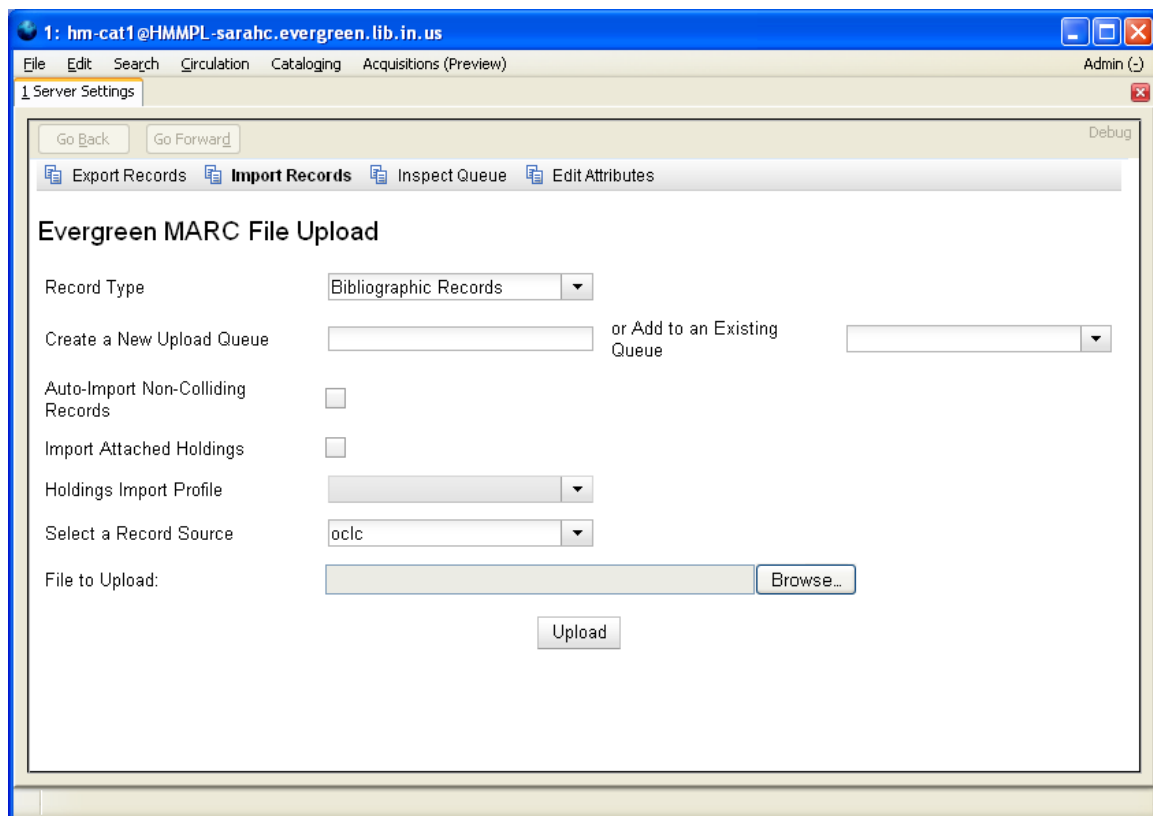
NOTE: Sometimes at this point the screen will freeze and it will appear that your items have not been imported. If you have waited several minutes and nothing appears to be happening, close things out and then search for the items in the catalog. You will likely find that the records have been imported.

If the bar shows the process has completed, the Import Queue will display again. You can search for them in the Evergreen Indiana Catalog to add holdings.

TIP: When searching for the record in the catalog, to find them more easily, you can limit your search to your local library. It will include the new records since they have no holdings yet

Importing Records via Batch with Auto-Import

Access the Batch Import/Export tool as described on page 24.1:



The screenshot shows a web browser window with the address bar displaying "1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us". The browser's menu bar includes "File", "Edit", "Search", "Circulation", "Cataloging", and "Acquisitions (Preview)". The main content area is titled "Evergreen MARC File Upload" and contains the following fields and controls:

- Record Type: Bibliographic Records (dropdown menu)
- Create a New Upload Queue: [text input] or Add to an Existing Queue: [dropdown menu]
- Auto-Import Non-Colliding Records:
- Import Attached Holdings:
- Holdings Import Profile: [dropdown menu]
- Select a Record Source: oclc (dropdown menu)
- File to Upload: [text input] with a "Browse..." button
- Upload: [button]

When you use auto-import the non-colliding records (records which do not conflict with records in the catalog based on ISBN or TCN) will upload straight into the catalog. You will not need to upload them from the Upload queue. However you should still choose/create an Upload Queue because any colliding records will be loaded to the queue so that you can review them.

Last Updated: 1/10/2011
Version 1.6.0.0

NOTE: If you do not create an upload queue an unnamed queue is created for you by default. It appears as a blank line on the drop-down list for Existing queues

If you have not created an Upload Queue, simply type the name you wish to use for your Queue in the **Create a New Upload Queue** box:

Evergreen MARC File Upload

Record Type
Create a New Upload Queue or Add to an Existing Queue
Auto-Import Non-Colliding Records

Or, if you have previously created an Upload Queue and you would like to add the records to that queue, you can select it from the drop-down list:

Evergreen MARC File Upload

Record Type
Create a New Upload Queue or Add to an Existing Queue
Auto-Import Non-Colliding Records
Import Attached Holdings
Holdings Import Profile

Duplicate Test

j dvd

Leveled readers

original july 1

overlay test

Click on the box to select **Auto-Import Non-Colliding Records**. If you do not select this box, then your batch will be imported into your record queue only, and from there you can import some or all of the records into the catalog.

Record conflicts are based on ISBN and TCN. If your record has the same ISBN or TCN as a record that exists in the system, it is a “colliding record” and it will not automatically import. You can then view the record from your record queue. If you determine that the colliding record is not a duplicate, you will be able to import the record from the record queue if the collision is based on ISBN. Records with colliding TCNs cannot be imported from the record queue, just as they cannot be imported via Z39.50.

*NOTE: The record collision feature does not guarantee that you will not import duplicate records. Items without ISBNs such as most music CDs and many DVDs will easily import as long as there is no TCN match, and you may import duplicate books if your record has a 13 digit ISBN while the existing record has a 10 digit ISBN. **Be sure to check the system for the records you need before batch importing.***

At this point you can also choose to import your records with attached holdings. If you would like to import your records with holdings attached, see **Importing Records with Attached Holdings** on page 24.21.

To import your batch of records, you will select the file of records you wish to upload. The file can come from various sources. It could be a record or set of records you have saved from an open on-line catalog such as Prospector, or a batch of records you have received or downloaded from a vendor or bibliographic record provider. You will need to have the file saved to your computer or a network drive which you can access.

Use the Browse button to select the file you'd like to import, and when it is displayed in the File to Upload box, Click the **Upload** button.

For more detailed instructions on selecting your file, see pages 24.5-6.

Export Records Import Records Inspect Queue Edit Attributes

Evergreen MARC File Upload

Record Type

Create a New Upload Queue or Add to an Existing Queue

Auto-Import Non-Colliding Records

Import Attached Holdings

Holdings Import Profile

Select a Record Source

File to Upload:

It may take a few moments for your records to display, and the following screens may display while you are waiting for the records to load:

Export Records Import Records In:

Upload Status

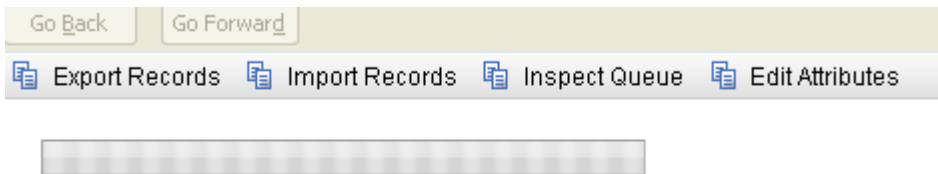
Uploading...

Processing... 20

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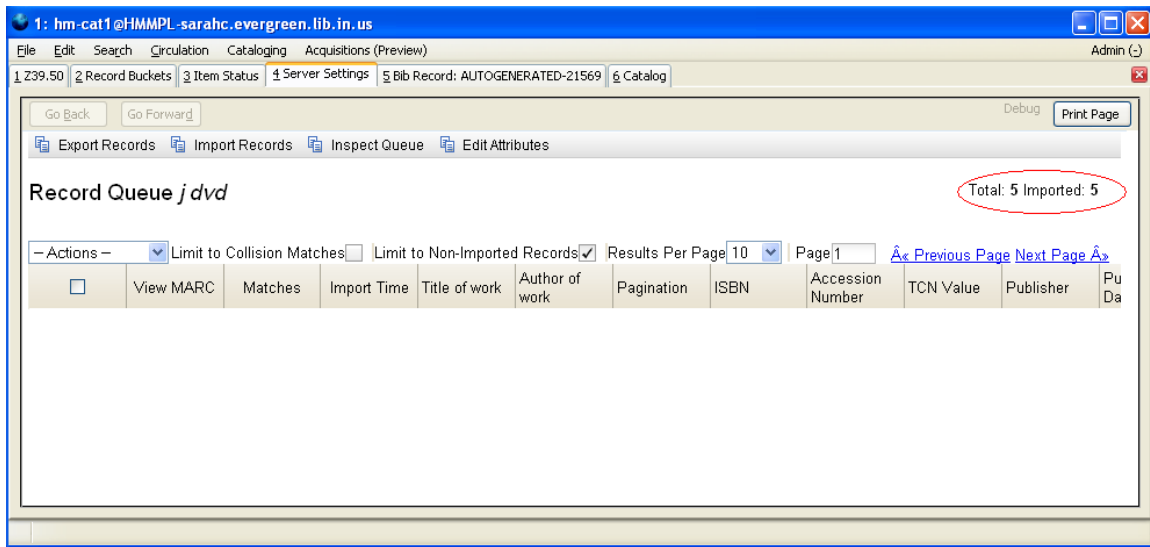
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You may see the animated bar below will be to indicate the system is processing your request:



NOTE: Sometimes at this point the screen will freeze and it will appear that your items have not been imported. If you have waited several minutes and nothing appears to be happening, close the Batch Importer and re-open it. You will likely find that the records now appear in your import queue.

Hopefully, however, when the records have loaded, the Record Queue will display:



If none of your records collided with existing records in the catalog, your record queue will appear to be empty. The number of records in the batch is displayed in the upper right hand corner of the screen. Above you'll see there were 5 records total and 5 imported. The records do not display in the record queue because the Limit to Non-Imported Records box is checked.

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If you wish to display the list of records imported, unclick the box, as seen below:

[Export Records](#) [Import Records](#) [Inspect Queue](#) [Edit Attributes](#)

Record Queue *j dvd* Total: 5 Imported: 5

Limit to Collision Matches **Limit to Non-Imported Records** Results Per Page 10 Page 1 [Previous Page](#) [Next Page](#)

<input type="checkbox"/> View MARC	Matches	Import Time	Title of work	Pagination	Accession Number	Publisher	Public Date
<input type="checkbox"/> View MARC	Matches	3/9/10	Chickens aren't the only ones produced by Lancit Media Productions, Ltd., a production of GPN/Nebraska ETV Network and WNED-TV Buffalo ; produced by Cecily Truett, Larry Lancit ; written by Mark Eisman ; executive producers, Twila C. Liggett, Tony Buttino ; directed by Mitchell Geller.	1 videodisc (30 min.) :	ocn505269589	Distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	Giving thanks a Native American good morning message / produced by Lancit Media Productions, Ltd., a production of GPN/Nebraska ETV Network and WNED-TV Buffalo ; produced by Kathy Kinsner ; written by Ronnie Krauss and Ellen Doherty ; executive producers, Twila C. Liggett, Tony Buttino, LeVar Burton ; directed by Kevin Lombard, Mark Mannucci and Larry Lancit.	1 videodisc (30 min.) :	ocn505274801	Distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	Raccoons and ripe corn produced by Ronnie Krauss ; directed by Larry Lancit ; written by Andrew Gutelle ; produced by Lancit Media Productions, Ltd. ; a production of WNED-TV & GPN.	1 videodisc (30 min.) :	ocn505284004	distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	The paper crane produced by Cecily Truett, Larry Lancit ; directed by Mitchell Geller ; written by Ellen Schechter ; produced by Lancit Media Productions, Ltd. ; a production of Great Plains National Television Library and WNED-TV.	1 videodisc (ca. 30 min.) :	ocn505284974	Distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	Germs make me sick produced by Lancit Media Productions, Ltd., a production of GPN/Nebraska ETV Network and WNED-TV Buffalo ; produced by Cecily Truett, Larry Lancit ; written by Ronnie Krauss ; executive producers, Twila C. Liggett, Tony Buttino ; directed by Hugh Martin.	1 videodisc (30 min.) :	ocn505285028	Distributed by GPN Educational Media,	2008

Here columns have been selected to and column sizes have been adjusted for ease of viewing. For information on adjusting the Record Queue display, see pages ***Adjusting the Upload Queue Display*** on pages 24.9-11.

Record Collisions

If any of the records in your batch collide with existing records, they will not be automatically imported, and they will display in your record queue. Here you see there were 5 total records in the batch. 3 imported, and 2 had record collisions and are displayed below:

Record Queue *juv materials* Total: 5 Imported: 3

Limit to Collision Matches Limit to Non-Imported Records Results Per Page 10 Page 1 [Previous Page](#) [Next Page](#)

<input type="checkbox"/> View MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number	Publisher	Publi Date	Edition
<input type="checkbox"/> View MARC	Matches	Help--my kid is driving me crazy : the 17 ways kids manipulate their parents, and what you can do about it / David Swanson.	Swanson, David, 1969-	xiii, 224 p. :	9780399535260	ocn311777529	Perigee Book,	2009	1st ed.
<input type="checkbox"/> View MARC	Matches	Tom and Jerry. Vol. 3 Hanna-Barbera Productions ; MGM Television ; Sib-Tower 12 Productions.		2 videodiscs (240 min.) :	1419850121	ocn153314845	Distributed by Warner Home Video,	2007	

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Chapter 24 – Batch Import/Export Tool

You can find out whether the collision is an ISBN or TCN collision by clicking the **Matches** link for that record:

Record Queue *juv materials*

Total: 5 Imported: 3

- Actions -		Limit to Collision Matches <input type="checkbox"/>	Limit to Non-Imported Records <input checked="" type="checkbox"/>	Results Per Page 10	Page 1	Previous Page	Next Page			
<input type="checkbox"/>	View MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number	Publisher	Publii Date	Edition
<input type="checkbox"/>	View MARC	Matches	Help--my kid is driving me crazy : the 17 ways kids manipulate their parents, and what you can do about it / David Swanson.	Swanson, David, 1969-	xiii, 224 p. :	9780399535260	ocn311777529	Perigee Book,	2009	1st ed.
<input type="checkbox"/>	View MARC	Matches	Tom and Jerry. Vol. 3 Hanna-Barbera Productions ; MGM Television ; Sib-Tower 12 Productions.		2 videodiscs (240 min.) :	1419850121	ocn153314845	Distributed by Warner Home Video,	2007	

The record below conflicts based on both ISBN and TCN:

Overlay Target	Source Match Point	Destination Match Point	ID	View MARC	Creator	Create Date	Last Edit Date	Source	TCN Source	TCN Value
<input type="checkbox"/>	isbn	isbn	17760229	17760229	FCPLR-CAT1	5/17/10	5/17/10		OCoLC	ocn153314845
<input type="checkbox"/>	rec_identifier	tcn_value	17760229	17760229	FCPLR-CAT1	5/17/10	5/17/10		OCoLC	ocn153314845

NOTE: Although there are *Overlay Target* boxes next to the records, *Overlay for Batch Import* does not work in this version.

To return to the Record Queue, just click the **Back to Import Queue** button.

If the record collision is based on TCN, it cannot be imported from the Import Queue, just as you cannot import items with the same TCN from Z39.50.

Records which collide based on ISBN, which do not also have a TCN collision, can be imported from the Import Queue, so if you review the record to be imported and the existing record and determine that they are for different items, you can import it from the queue. For information on how to import records from the queue, see **Uploading Records from the Upload Queue** on page 24.14

Importing Records with Attached Holdings

When you load records to Evergreen Indiana by any method, always check the system first for existing records which match your items. Do not load duplicate records to the system.

To import records with holdings already attached, you must include holdings information in the 949 line of your MARC record. If you buy MARC records from a vendor, you can request that they include this information. If you use OCLC Connexion, or another piece of software that allows you to edit MARC records, you can add the 949 line yourself before importing the records to Evergreen Indiana.

The following format should be used:

Copy information	Subfield	Format to enter data
owning_lib	a	Shortname of owning branch (ex -ISLI)
circ_lib	b	Shortname of circulating branch (ex -ISLI)
call_number	c	text string containing your call number label
copy_number	d	text string or integer
status	e	text string matching one of the copy status values
location	f	text string matching one of your Copy Locations
circulate	g	"t" or "f" boolean values
deposit	h	"t" or "f" boolean values
deposit_amount	i	text string (do not include the dollar sign)
ref	j	"t" or "f" boolean values
holdable	k	"t" or "f" boolean values
price	l	text string (do not include the dollar sign)
barcode	m	text string
circ_modifier	n	text string matching one of the circ
circ_as_type	o	text string corresponding to a MARC code (a, j, i, e, o, etc.)
alert_message	p	text string for staff client alert
opac_visible	q	"t" or "f" boolean values
pub_note_title	r	text string
pub_note	s	text string
priv_note_title	t	text string
priv_note	u	text string

Examples:

```
949
\\$aAPLSD$bAPLSD$cCDDAV$eInprocess$fAV$gt$hf$jf$kt$I19.99$m1234567891234$ncd-
music$pPrivate alert message here$qt$RPublic$sPublic Note Here$tPrivateNote$uPrivate Note
Here
```

```
949 | | | HMMPL #b HMMPL #c MUSIC CD CHRISTMAS INDIANAPOLIS #e In process #f Music CDs . 2nd Floor #g t #h
f #j f #k t #l 15.00 #m 33946002490063 #n cd-music #q t
```

You do not need to code the first or second indicator of the 949 field.

At a minimum, code subfields a, b, e, g, t, h, j, k, m, n, q
If you don't code c, your item will have no call number, and if you don't code f,
your item will show a location of "Stacks."

NOTE: You currently can't set hold protection or loan duration when importing attached holdings. To change these, pull up the items in the Item Status screen to edit after you have imported the items.

If you have a batch of records set up with holdings data included in the 949 field, you can import the records. You will need to select **Auto-Import Non-Colliding Records**, and **Import Attached Holdings**. You will also select "**OCLC Connexion Format (Indiana Custom) – 949**" from the **Holdings Import Profile**. Then choose either OCLC or System local from the Invisible w/o holdings choices.

NOTE: Invisible w/o holdings means the record would be invisible in the OPAC if no holdings were attached. It does not mean these import choices are only to be used if you are importing records without holdings.

Evergreen MARC File Upload

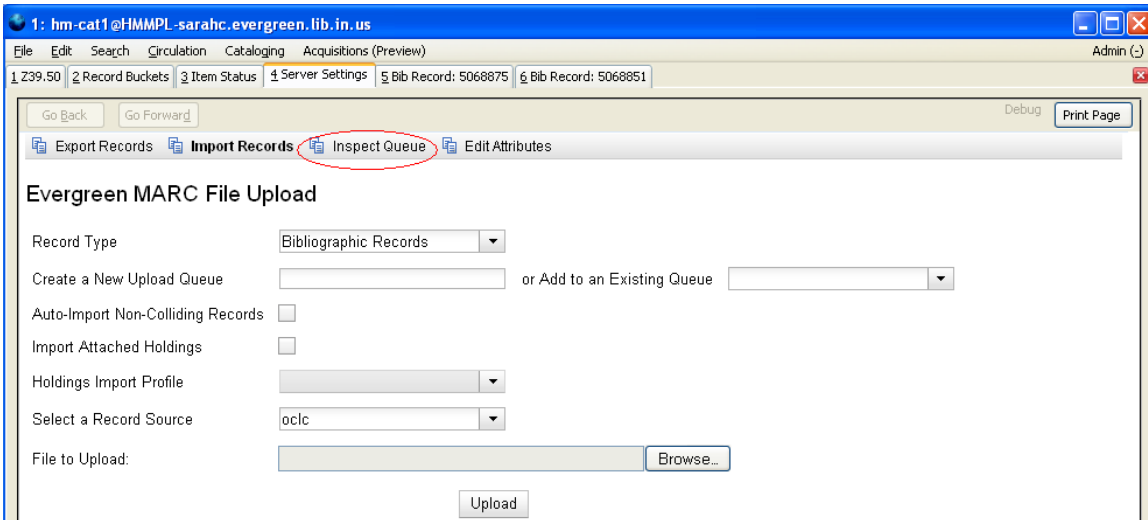
Record Type	<input type="text" value="Bibliographic Records"/>	
Create a New Upload Queue	<input type="text"/>	or Add to an Existing Queue <input type="text" value="Music CD with holdings"/>
Auto-Import Non-Colliding Records	<input checked="" type="checkbox"/>	
Import Attached Holdings	<input checked="" type="checkbox"/>	
Holdings Import Profile	<input type="text" value="OCLC Connexion Format"/>	
Select a Record Source	<input type="text" value="OCLC - Invisible w/o holdin"/>	
File to Upload:	<input type="text" value="L:\OCLC\Data\Export.marc.dat"/>	<input type="button" value="Browse..."/>
<input type="button" value="Upload"/>		

Once you have made the appropriate selections, click the Upload record to load your records. If needed, see page 24.15 **Importing Records via Batch with Auto-Import** for more detailed instructions about uploading records.

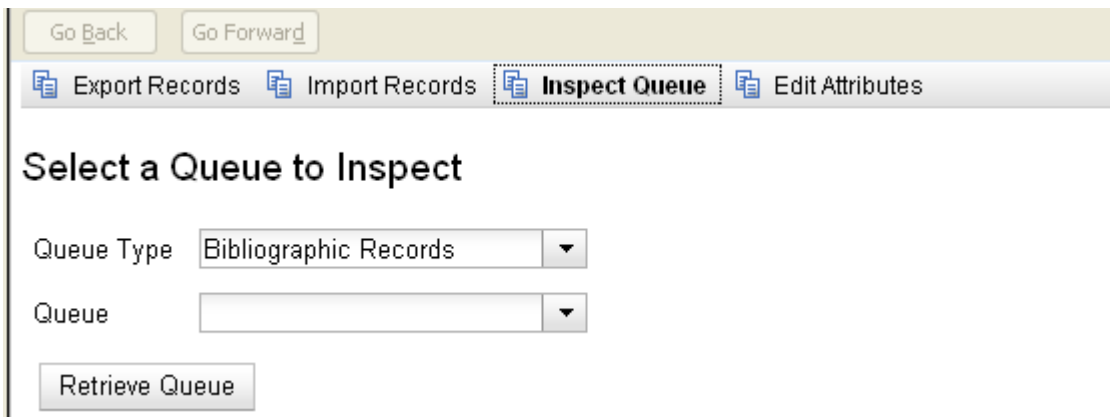
Your records should load into Evergreen Indiana with your holdings attached. Use the barcodes to check the records from the Item Status screen. If you find some of your records have not loaded, check the upload queue for record collisions.

Viewing an Upload Queue

If your import queue does not open automatically, or if you want to view it again later, you can access it from the Batch Load screen. When you open the Batch Loader, it opens to the Import Records Screen by default. You can change the screen by clicking one of the other menu options. To view your upload queue, click **Inspect Queue**:



The Inspect Queue screen will open:



From the Queue drop-down list, select the upload queue you'd like to view:

TIP: If the batch you want to view does not appear on the list, close the Batch Loader and re-open it. If it still does not appear you will need to re-load the batch. If you did not select a queue when you loaded your batch, your items will load to an un-named queue that will display as a blank line at the top of the list.

When the correct queue is displayed, click the **Retrieve Queue** button:

Your Record Queue will open:

Export Records Import Records **Inspect Queue** Edit Attributes

Record Queue *juv materials* Total: 5 Imported: 4

View MARC
 Limit to Collision Matches
 Limit to Non-Imported Records
 Results Per Page: 10
 Page 1
 [Â« Previous Page](#) [Next Page Â»](#)

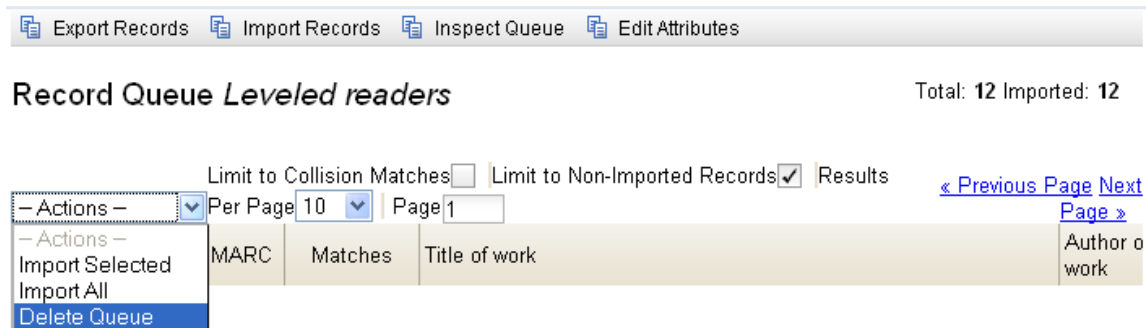
<input type="checkbox"/>	View MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number	Publisher	Publication Date	Edition
<input type="checkbox"/>	View MARC	Matches	Tom and Jerry, Vol. 3 Hanna-Barbera Productions ; MGM Television ; Sib-Tower 12 Productions.		2 videodiscs (240 min.) :	1419850121	ocn153314845	Distributed by Warner Home Video,	2007	

Deleting an Upload Queue

This will not delete the records from the catalog if you've already imported them. The Queue is somewhat like a bucket in that it just collects the records in one spot for viewing and managing.

To delete an upload queue, open the queue you wish to delete. (See **Viewing an Upload Queue** on page 24.23 if needed.)

From the **Actions Menu**, select **Delete Queue**:



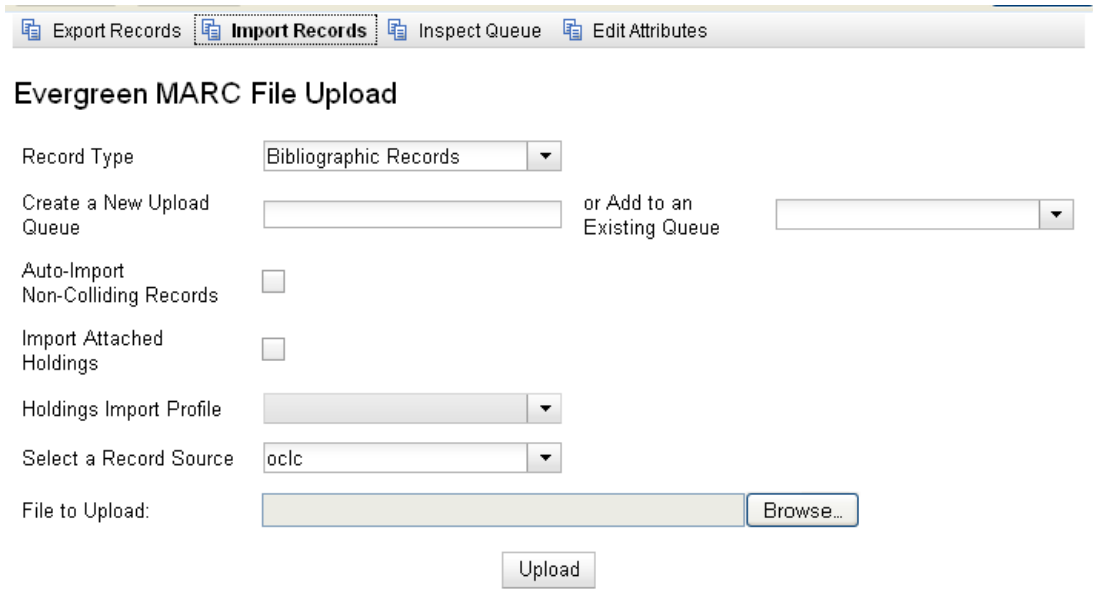
The screenshot shows a toolbar with buttons for 'Export Records', 'Import Records', 'Inspect Queue', and 'Edit Attributes'. Below the toolbar, the text 'Record Queue *Leveled readers*' is displayed on the left, and 'Total: 12 Imported: 12' is on the right. A search and filter area includes 'Limit to Collision Matches' (unchecked), 'Limit to Non-Imported Records' (checked), and 'Results'. A dropdown menu is open over the 'Actions' button, showing options: 'Import Selected', 'Import All', and 'Delete Queue' (highlighted in blue). Below the menu, a table header is visible with columns: 'MARC', 'Matches', 'Title of work', and 'Author o work'. Navigation links '« Previous Page Next Page »' are also present.

A dialog box will open asking if you are sure you want to delete the queue:



Click **OK**.

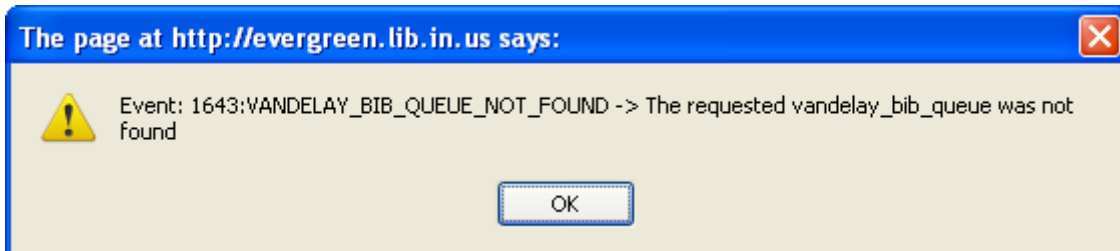
The Import Records Tab will open:



The screenshot shows the 'Evergreen MARC File Upload' window. At the top, there are four tabs: 'Export Records', 'Import Records' (which is selected), 'Inspect Queue', and 'Edit Attributes'. Below the tabs, the form includes the following fields and controls:

- Record Type:** A dropdown menu set to 'Bibliographic Records'.
- Create a New Upload Queue:** An empty text input field.
- or Add to an Existing Queue:** A dropdown menu.
- Auto-Import Non-Colliding Records:** An unchecked checkbox.
- Import Attached Holdings:** An unchecked checkbox.
- Holdings Import Profile:** A dropdown menu.
- Select a Record Source:** A dropdown menu set to 'oclc'.
- File to Upload:** A text input field with a 'Browse...' button to its right.
- Upload:** A button centered below the file input field.

NOTE: Your deleted queue will still be listed on the drop-down menu in the Inspect Queue tab until you close the Batch/Import Export tool, but if you try to open a deleted queue you get a processing bar and this error message:



Click OK and then either close the Batch Import/Export tool or open one of the other screens in the tool, such as Import Batch to clear the processing bar.

The Export Records and Edit Attributes Screens

In addition to the default Import Records screen and the Inspect Queue screen, the Batch Loader has two other screens. To access these screens, click on the screen name in the menu:

Evergreen MARC File Upload

Record Type: Bibliographic Records

Create a New Upload Queue: or Add to an Existing Queue:

Auto-Import Non-Colliding Records:

Import Attached Holdings:

Holdings Import Profile:

Select a Record Source: oclc

File to Upload:

The Export Records Screen

The Export Records screen gives various options for exporting records from the system.

Export Records

Use Field Number: 0 (starting from 0)

From CSV File:

Or

Record ID:

Or

Record Bucket ID:

Record Type: Bibliographic Records

Record Format: MARC21

Record Encoding: UTF-8

Include holdings in Bibliographic Records:

Evergreen Indiana Cataloging Training Manual

Chapter 24 – Batch Import/Export Tool

The Export Records function does work. It exports copies of the bibliographic records from the system into a file. The original records remain in the catalog.

NOTE: Since the Overlay with Batch Import function is currently unreliable, exporting records to batch edit and re-import is not an efficient use of time. That's the only cataloging use I could think of for this feature, so I have not produced further documentation on how to use the Export Records function. If you have another use for this function, feel free to experiment with it, or contact Sarah Childs at sarahc@zionsville.lib.in.us for further information on how to use the Export Records function.

The Edit Attributes Screen

The Edit Attributes Screen is for use with the future Acquisitions module. Documentation on this section will be forthcoming when that module is live in version 2.0

Export Records Import Records Inspect Queue Edit Attributes							
<input checked="" type="radio"/> Bibliographic attributes <input type="radio"/> Authority attributes Create Attribute Definition ▾							
ID	Code	Description	Tag	Subfield	Identifier	XPath	Remove
1	title	Title of work	245	a,b,c,m,n,o,p,f		<code>//*[tag="245"] /*[contains("abcmnopr",@</code>	
2	author	Author of work	100,110,113	a,d	f	<code>//*[tag="100" or @tag="110" or @tag="113"]/* [contains("ad",@code)]</code>	
3	language	Language of work	240	l	f	<code>//*[tag="240"] /*[@code="l"][1]</code>	
4	pagination	Pagination	300	a	f	<code>//*[tag="300"] /*[@code="a"][1]</code>	
5	isbn	ISBN	020	a	t	<code>//*[tag="020"] /*[@code="a"]</code>	(?:-\s.+)\$
6	issn	ISSN	022	a	t	<code>//*[tag="022"] /*[@code="a"]</code>	(?:-\s.+)\$
7	price	Price	020,022	c	f	<code>//*[tag="020" or @tag="022"]/* [@code="c"][1]</code>	
8	rec_identifier	Accession Number	001		t	<code>//*[tag="001"]</code>	
9	eg_tcn	TCN Value	901	a	t	<code>//*[tag="901"] /*[@code="a"]</code>	