Batch Import/Export

The Batch Import/Export tool is still under development.

Many of the features of the tool are not currently functional.

Please keep this in mind and be patient as you use the tool. Hopefully the tool will be fully functional for Version 2.0.
Batch Import/Export

What you can do with the Batch Import/Export tool as of today:

- Import batches of Bibliographic records to the system
- Import batches of new Bibliographic records with holdings data attached
- Export batches of copies of Bibliographic records from the system
Batch Import/Export

What you can’t do as of today:

• Import Authority Records
• Overlay existing records
• Edit the records in the Importer before they are uploaded
• Batch import holdings data for records already existing in Evergreen Indiana
Record Sources

Places where you can get records for Batch Import:

- Subscription services such as OCLC or vendors
- The Library of Congress
  [http://catalog.loc.gov/webvoy.htm](http://catalog.loc.gov/webvoy.htm)
- Other libraries with access on their websites
Record Sources

- Albuquerque-Bernalillo County Library System (NM) [http://albuq.cabq.gov/screens/librarybanner.jpg](http://albuq.cabq.gov/screens/librarybanner.jpg)
- Canton Public Library (MI) [http://catalog.cantonpl.org/](http://catalog.cantonpl.org/)
- Carrollton Public Library (TX) [http://innovative.cityofcarrollton.com/](http://innovative.cityofcarrollton.com/)
- Central Arkansas Library System (AR) [http://vera.cals.lib.ar.us/](http://vera.cals.lib.ar.us/)
- Cuyhoga County Public Library (OH) [http://sciron.cuyahoga.lib.oh.us/](http://sciron.cuyahoga.lib.oh.us/)
- Greenwich Library (CT) [http://pac.greenwichlibrary.org/](http://pac.greenwichlibrary.org/)
- Helin Library (RI) [http://library.uri.edu/](http://library.uri.edu/)
- Kentucky Department of Libraries and Archives (KY) [http://kdla.kyvl.org/vwebv/searchBasic](http://kdla.kyvl.org/vwebv/searchBasic)
- La Porte County Library (IN) [http://catalog.lapcat.org/](http://catalog.lapcat.org/)
- Lakeland Library Cooperative (Western MI) [http://lakenet.llcoop.org/search%7ES1](http://lakenet.llcoop.org/search%7ES1)
- Luzerne County Library System (PA) [http://209.50.143.33/](http://209.50.143.33/)
- Marquette University (MI) [http://libus.csd.mu.edu/](http://libus.csd.mu.edu/)
- Merlin Library Catalog (Northern WI) [http://merlin.nwls.lib.wi.us/](http://merlin.nwls.lib.wi.us/)
- Middle Country Public Library (Long Island, NY) [http://www.mcpl.lib.ny.us/search.html](http://www.mcpl.lib.ny.us/search.html)
- Multnomah County Library (OR) [http://catalog.multcolib.org/search](http://catalog.multcolib.org/search)
- Newport Beach Public Library (CA) [http://millennium.newport.lib.ca.us/](http://millennium.newport.lib.ca.us/)
- Norwalk Public Library System (CT) [http://catalog.norwalklib.org/](http://catalog.norwalklib.org/)
- Norwin Public Library (PA) [http://www.norwinpubliclibrary.org/](http://www.norwinpubliclibrary.org/)
- Oakland Public Library (CA) [http://catalog.oaklandlibrary.org/](http://catalog.oaklandlibrary.org/)
- OPAL Catalog (OH) [http://cat.opal-libraries.org/search/X](http://cat.opal-libraries.org/search/X)
Record Sources

- Pima County Public Library (Tucson, AZ) [https://librarycatalog.pima.gov/search](https://librarycatalog.pima.gov/search)
- Portsmouth Libraries (NH) [http://12.30.15.69/](http://12.30.15.69/)
- Prospector (CO) [http://prospector.coalliance.org/](http://prospector.coalliance.org/)
- Riverside Public Library (CA) [http://read.riversideca.gov/](http://read.riversideca.gov/)
- SageCat (Eastern OR) [http://eos.eou.edu/](http://eos.eou.edu/)
- San Francisco Public Library (CA) [http://sflib1.sfpl.org/](http://sflib1.sfpl.org/)
- Scottsdale Public Library (AZ) [http://libcat.scottsdaleaz.gov/](http://libcat.scottsdaleaz.gov/)
- St. John the Baptist Parish Public Library (LA) [http://opac.stjohn.lib.la.us/](http://opac.stjohn.lib.la.us/)
- St. Joseph County, Mishawaka-Penn-Harris, Plymouth, and Bremen Public Libraries (IN) [http://stjos.sjcpl.lib.in.us/](http://stjos.sjcpl.lib.in.us/)
- Sunnyvale Public Library (CA) [http://sunset.ci.sunnyvale.ca.us/](http://sunset.ci.sunnyvale.ca.us/)
- SWAN Libraries (IL) [http://swan.mls.lib.il.us/](http://swan.mls.lib.il.us/)
- Thousand Oaks Public Library (CA) [http://search.tolibrary.org/](http://search.tolibrary.org/)
- Thurgood Marshall Law Library (Texas Southern University) [http://library.tsulaw.edu/](http://library.tsulaw.edu/)
- Virginia Theological Seminary (VA) [http://librarycatalog.vts.edu/](http://librarycatalog.vts.edu/)
- Watauga Regional Public Libraries (TN) [http://libraries.etsu.edu/](http://libraries.etsu.edu/)
- WebPac Prolibraries.url [http://wiki.library.oregonstate.edu/confluence/display/WebOPAC/Libraries+that+have+installed+WebPac+Pro](http://wiki.library.oregonstate.edu/confluence/display/WebOPAC/Libraries+that+have+installed+WebPac+Pro)
- York County Library System (PA) [http://millennium.yorklibraries.org/](http://millennium.yorklibraries.org/)
Record Sources

- Note that at a previous roundtable we suggested MelCat at http://elibrary.mel.org/search as a good source of records.
- It has a wealth of records that are free to download, but unfortunately if you import them directly from the MelCat site, they import into Evergreen with an extra blank 008 field.
- This leads to nonsensical fixed fields which cannot be edited.
- The problem has been reported, and we are hoping this will be resolved so that the records can be used in the future.
- At this time we recommend that this site not be used, because the fixed fields cause display and searching issues.
- However, MelCat records can be downloaded successfully using a subscription services called BookWhere.
Accessing the Import Tool

You can access the Batch Import/Export tool from an icon on the splash screen, or from the Cataloging menu.
Import Records

There are four ‘tabs’ in the Importer/Exporter. The active tab when you open it is Import.
Import Records

• To Batch Import records, you must have the records saved to your computer in MARC format.
• When you have an option as to how to save the records, choose MARC Unicode.
The Batch Importer/Exporter gives the option to import either bibliographic or authority records. At this time, only the bibliographic option works.
Import Records

To create a new Upload Queue just type the name of the queue in the empty box before you import a batch.

To add to an existing queue instead, select that queue from the drop-down list.
Import Records

You can automatically import all records that do not have possible matches in the system by placing a checkmark in the box.

If you do not choose auto-import, the records will be uploaded to your Record Queue and you will have a chance to review them before you import them.
Import Records

- If you have holdings information included in the 949 field of your MARC record, you can import records with holdings attached.
- For information on how to set up the 949 fields, see Chapter 24 of the Training Manual.
- You must currently use the Auto Import function.
- Select the Holdings Import Profile seen below:

```
Auto-Import Non-Colliding Records  
Import Attached Holdings  
Holdings Import Profile  
Select a Record Source  
File to Upload:
```

OCLC Connexion Format  
Evergreen 852 export format  
Unicorn Import format -- 999  
OCLC Connexion Format (Indiana Custom) -- 949
Import Records

• 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.”

• Use the “Trancend 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 –Trancend w/o holdings”
When you’ve selected all the options you need, click browse to find the file on your computer that you wish to upload. Then click Upload.
Inspect Queue

The file will open in the Inspect Queue tab.

- The Upload Queue works as a record import manager. It allows you to store batches of records which you are uploading to different queues. You can then use the Inspect Queue tab to review the records.

- You can create a new queue for each batch of items or add the batch to a queue you already have. You cannot delete items from an existing queue, so you may find it more manageable to create a new queue. Old queues can be deleted.

- If you didn’t enter a name in the upload queue, a queue will still be created. It will be a nameless queue and show up as a blank line on the drop down list.
Inspect Queue

If you have not chosen auto-import, all of your records will be loaded to the upload queue:
Inspect Queue

If you have chosen auto-import, your records will be loaded directly into the catalog, and if you don’t have colliding records your import queue will appear empty:
Inspect Queue

- You can still view imported records in the Import Queue by unchecking the limit to Non-Imported Records box:
Inspect Queue

The Upload Queue is configurable:

- You can choose which columns are displayed in the records summaries with a column picker, and save your changes.
- You can change the widths of the columns, but you currently cannot save these changes.
- You can click on view MARC to view the full MARC record.
- You can change how many records you view, and limit to Non-imported or Matching records.
Matching Records

Matches

• If there is a link in the Matches column, the system has found a match and the record has not been auto-imported.

• The batch importer checks for matches based on ISBN as well as TCN, so it may find a ‘match’ that you have determined is not the correct record.

• It does not check for matches based on UPC and an equivalent ISBN 10 and ISBN 13 won’t be matched, so it is still very easy to import duplicate records via batch.

• You should always check the system for the records before you batch import, just as you would before importing via Z39.50.
Matching Records

Matches

- You can click on the link to see a summary of information about the matching record.
- You will need to look up the item in the catalog to view the MARC record to determine if it is truly a match.

Use the Back to Import Queue button to return to your list of records.
Adding Holdings

If you’ve used Auto Import, and checked your Import Queue to see if you had any record matches, you can search for the records in the catalog to add your holdings.

Tip: To find them more easily, you can limit your search to your local library. It will include new records without holdings.
Importing from Upload Queue

If you have not used auto-import, you will need to import your records from the Upload Queue.

You can either select Import All from the Actions list or click the check boxes and use Import Selected.
Deleting Queues

From the Actions List you can also select Delete 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.

Note: You can delete the whole queue, but you can’t remove items from the queue.
Export Records

The tab on the far left is the Export Records tab.
Export Records

The Record Export tab allows you to Export batches of MARC records or single records, for instance you can export a bucket by bucket number. When exported, the records will be saved to a file on your desktop.

This will be useful in the future for doing batch edits of MARC records, but since you cannot currently overlay the records upon import, this would be not much quicker than individually editing the records.

Information on Exporting records will be forthcoming, and we’ll be happy to answer questions about it if you have a use for it.
Edit Attributes Screen

• The final tab, Edit Attributes, allows you to do batch edits to the MARC records as they are imported.

• This feature is for use with the acquisitions module which is coming.