The Import/Export Business: Working with Vandelay in Evergreen

Angela Kilsdonk, Education Manager
Equinox Software

Importing Bibliographic Records

- Files of MARC records, from vendor, OCLC
  - Embedded holdings?
  - Duplicate records?
  - Overlay/merge profiles?
  - Insufficient Quality Fall-Through Profile….?

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

Check Out | Check In | Search Catalog | Item Status | Patron Search | Patron Registration

1 Server Settings +

Go Back | Reload | Go Forward | Debug | Print Page

Export Records | **Import Records** | Inspect Queue | Record Display Attributes | Merge / Overlay Profiles | Record Match Sets | Holdings Import Profiles

Evergreen MARC File Upload

Record Type: Bibliographic Records

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

Record Match Set: _____ Limit matches to bucket: _____

Holdings Import Profile: _____

Select a Record Source: oclc

Record Import Actions

Merge Profile: _____

Import Non-Matching Records ☐

Merge On Exact Match (901c) ☐

Merge On Single Match ☐

Merge On Best Match ☐

Best/Single Match Minimum Quality Ratio: 0.0 New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile: _____

Remove MARC Field Groups:
- ☐ OCLC (APEX)
- ☐ 029 (APEX)

Copy Import Actions

Auto-overlay In-process Acquisitions Copies ☐

File to Upload: _____ Browse... Upload

Import Workflows

- Importing records
- Importing records with holdings (from vendor)
- Import records and generate holdings

Importing Bib Records

Things to think about:

- Record Match Sets
  - Are these titles re-orders/are these records already in the catalog? If so, how can I find matches?
- Merge/Overlay Profiles
  - How do I want Evergreen to process duplicate records?
- Holdings Import Profiles
  - Do my MARC records have holdings information in them?

Record Match Sets

Go Back | Reload | Go Forward | Debug | Print Page

Export Records | Import Records | Inspect Queue | Record Display Attributes | Merge / Overlay Profiles

Record Match Sets | Holdings Import Profiles

Vandelay Match Sets

New Match Set | Delete Selected

Show sets owned at or below: Apex Branch

Back Next Filter

✓	#	Name	Owning Library	Match Set Type
☐	1	ISBN	APEX	biblio
☐	2	Title	APEX	biblio

Go Back | Reload | Go Forward | Debug | Print Page

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Record Match Sets | Holdings Import Profiles

Vandelay Match Set Editor

Match set name: **ISBN**
Owning Library: Apex Branch
Type: biblio

Your Expression: (020 ‡a)

Add new | Record Attribute | MARC Tag and Subfield | Boolean Operator

Working Match Point

Tag: 010
Subfield: ‡
Match Score 1
Negate? ☐
Ok

- Define this match point using the above fields, then drag me to the tree on the right.

Your Expression

AND
020 ‡a | Match score 1

Delete Selected Node | Enter Replace Mode

Save Changes To Expression

Quality Metrics for this Match Set

Record Attribute | MARC Tag and Subfield | Delete Selected Metrics

configured match on ISBN (020$a)

adding a 2nd match point using MARC Tag and Subfield (010) for matching on ISBN and LCCN)

Quality Metrics

- Ensures that the incoming record is as good as or better than the record that is already in your catalog
- Evergreen uses the configured quality metrics to evaluate incoming records against existing records
- ELvl (Encoding Level)
- Optional

Go Back | Reload | Go Forward | Debug | Print Page

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Record Match Sets | Holdings Import Profiles

match point.

020 ‡a | Match score 1

Delete Selected Node | Enter Replace Mode

Save Changes To Expression

Quality Metrics for this Match Set

Record Attribute | MARC Tag and Subfield | Delete Selected Metrics

Record Attribute: ELvl

Value: 4

Match Score 7

Ok | Cancel

Back Next Filter

✓	#	Quality	Record Attribute	Tag	Subfield	Value
☐	**1**	10	enc_level			
☐	**2**	9	enc_level			1
☐	**3**	8	enc_level			2

Merge/Overlay Profiles

- 2 default profiles
  - Full Overlay
    - Will overlay existing record with incoming record
  - Match-Only Merge
    - For incoming records with embedded holdings--allows you to import holdings and attach to existing record without importing new bib
- Create custom profiles

Merge/Overlay Profile

Name	590 preserve
Owner	APEX
Preserve Specification	590
Replace Specification	
Add Specification	
Remove Specification	
Min. Quality Ratio	
Field ID	15
Cancel	Save

Ready to Import?

- Uploading bib records only (no embedded holdings)--- ready to import!

Holdings Import Profile

- Import holdings information that is embedded in your MARC records
  - likely vendor records for pre-processed/shelf-ready items
- Evergreen will extract this information from the MARC records and automatically create items for the bib records

Holdings Import Profiles

Go Back | Reload | Go Forward | Debug | Print Page

Export Records | Import Records | Inspect Queue | Record Display Attributes | Merge / Overlay Profiles

Record Match Sets | **Holdings Import Profiles**

Holdings Import Profiles

New Definition | Delete Selected

Context Org Unit: APEX

Back Next Filter

✓	#	Alert Message	Barcode	Call Number	Circulate	Circulate As MARC Type	Circulating Library	Circulation Modifier	Copy Number	Depos
☐	1		p	j	[@code = "x" and text() = "circulating"]		[@code = "b"][2]	g	t	
☐	2		i	a				t		

Embedded holdings and profile

Record Match Sets | **Holdings Import Profiles**

Holdable	
Keep	☐
Name	856 Import
OPAC Visible	
Overlay Match ID	
Owner	APEX
Owning Library	d
Price	p
Private Note	
Public Note	
Reference	
Shelving Location	s
Status	t
Tag	856

File Edit Fonts Reports Tools Plug-ins Help

```
story of the muckraking press, which arouses the spirit of reform that helps Roose
to shed its laissez-faire attitude toward robber barons, corrupt politicians, and corp
natural resources. The muckrakers are portrayed through the greatest group of jou
at one magazine -- Ida Tarbell, Ray Stannard Baker, Lincoln Steffens, and William
under the mercurial genius of publisher S. S. McClure. Goodwin's narrative is foun
primary materials. - Jacket flap.
=600  10$aRoosevelt, Theodore,$d1858-1919.
=600  10$aTaft, William H.$q(William Howard),$d1857-1930.
=651  \0$aUnited States$xPolitics and government$y1901-1909.
=651  \0$aUnited States$xPolitics and government$y1909-1913.
=650  \0$aProgressivism (United States politics)$xHistory$y20th century.
=650  \0$aPress and politics$zUnited States$xHistory$y20th century.
=610  20$aRepublican Party (U.S. : 1854- )$xHistory$y20th century.
=856  \\$a646543555$bE757 .G66 2013$cBook$dAPEX$p20.00$sStacks$tAvailab
=856  \\$a646543556$bE757 .G66 2013$cBook$dAPEX$p20.00$sStacks$tAvailab
=994  \\$aC0$bEQNOX

=LDR  02944cam  2200433 i 4500
=001  ocn843858721
=003  OCoLC
```

Ready to Import!

- Record Match Set
- Merge/Overlay Profiles
- Holdings Import Profile

Evergreen MARC File Upload

Record Type: Bibliographic Records

Create a New Upload Queue: March nonfic

or Add to an Existing Queue:

Record Match Set: ISBN

Limit matches to bucket:

Holdings Import Profile: 856 Import

Select a Record Source: oclc

Record Import Actions

Merge Profile: Full Overlay

Import Non-Matching Records: ☑

Merge On Exact Match (901c): ☐

Merge On Single Match: ☑

Merge On Best Match: ☑

Best/Single Match Minimum Quality Ratio: 0.0 New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile:

Remove MARC Field Groups:
- ☐ OCLC (APEX)
- ☐ 029 (APEX)

Copy Import Actions

Auto-overlay In-process Acquisitions Copies: ☐

File to Upload: C:\Users\akilsdonk\Desktop\acq records to upload Browse... Upload

Remove MARC Field Groups

- Configure under Server Admin
- Can be applied:
  - Cataloging ->MARC Batch Import/Export
  - Cataloging-> Import Record from Z39.50
  - Acquisitions -> Load MARC Order Records

MARC Import Remove Fields

Go Back | Reload | Go Forward | Debug | Print Page

Import Bib Trash Fields

New Field Group | Delete Selected

Filter

✓	#	ID	Short (Policy) Name	Label	Always Apply
☐	1	3	APEX	029	f
☐	2	1	APEX	OCLC	f

Go Back | Reload | Go Forward | Debug | Print Page

OCLC

New Field | Delete Selected

Return to Groups

Filter

✓	#	Field ID	Field
☐	1	1	955
☐	2	5	954

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Copy Import Actions

Auto-overlay In-process Acquisitions Copies: ☐

File to Upload: C:\Users\akilsdonk\Desktop\acq records to upload Browse... Upload

Copy Overlay

- 2 options for copy overlay
  - Copy ID Match
  - Auto-overlay In process Acquisitions copies

Evergreen MARC File Upload

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or Add to an Existing Queue:

Record Match Set: ISBN

Limit matches to bucket:

Holdings Import Profile: 856 Import

Select a Record Source: oclc

Record Import Actions

Merge Profile: Full Overlay

Import Non-Matching Records: ☑

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Merge On Single Match: ☑

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Copy Import Actions

Auto-overlay In-process Acquisitions Copies: ☐

File to Upload: C:\Users\akilsdonk\Desktop\acq records to upload Browse... Upload

Import Queue (Import Summary)

Queue *March nonfic*

Queue Actions

- Import Selected Records
- Import All Records
- View Import Items
- Delete Queue
- Copy To Bucket

Queue Summary

Records in Queue:	3
Records Imported:	3
Record Import Failures	0
Items in Queue	4
Items Imported	4
Item Import Failures	0

Queue Filters

- Limit to Records with Matches ☐
- Limit to Non-Imported Records ☐
- Limit to Records with Import Errors ☐

Export Queue As... | Records Per Page 10 | Page 1 | « Previous | Next »

☐	View MARC	Matches	Import Failures	Import Time	Title of work	Author of work	Language of work	Pagination	ISBN
					The				

Bucket

Item Import Failures 0

Export Queue As... Records Per Page

10 Page 1 « Previous Next »

	View MARC	Matches	Import Failures	Import Time	Title of work	Author of work	Language of work	Pagination	ISBN
☐	View MARC			3/18/14	The monuments men : allied heroes, Nazi thieves and the greatest treasure hunt in history / Robert M. Edsel with Bret Witter.	Edsel, Robert M.		xvi, 473 p. :	978159995
☐	View MARC			3/18/14	The bully pulpit : Theodore Roosevelt, William Howard Taft, and the Golden Age of journalism	Goodwin, Doris Kearns,		xiv, 910 pages, 32 unnumbered pages of plates :	141654786

Import Queue (Record Attributes)

Search the Catalog | Advanced Search | Browse the Catalog

Search: bully pulpit Type: Keyword Format: All Formats

Library: Equinox Consortium Search

Recent searches

◄ Search Results Showing Item 1 of 2 Next ►

The bully pulpit : Theodore Roosevelt, William Howard Taft, and the Golden Age of journalism / Doris Kearns Goodwin.

Goodwin, Doris Kearns, author. (Author).

Language material

Available copies

- 2 copies at Equinox Consortium.

Current holds

0 current holds with 2 total copies.

Place Hold

Add to my list

Print / Email

LOCATION	CALL NUMBER / COPY NOTES	BARCODE	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE	HOLDABLE?	STATUS	DUE DATE
Apex Branch	E757 .G66 2013 (Text)	646543555	Stacks	None	03/18/2014	Copy hold / Volume hold	Available	-
Apex Branch	E757 .G66 2013 (Text)	646543556	Stacks	None	03/18/2014	Copy hold	Available	-

Auto-generate item info

- New Library Settings allows Evergreen to generate item information:
  - Item barcodes & prefixes
  - Call numbers & prefixes
  - Default circulation modifier
  - Default copy location

Record Export

- MARC Batch Import/Export
- Record Buckets

MARC Batch Export

Go Back | Reload | Go Forward | Debug | Print Page

Export Records | Import Records | Inspect Queue | Record Display Attributes | Merge / Overlay Profiles

Record Match Sets | Holdings Import Profiles

Export Records

Use Field Number: 0 (starting from 0)

From CSV File: Browse...

Or

Record ID:

Or

Record Bucket ID:

Record Type: Bibliographic Records

Record Format: MARC21

Record Encoding: UTF-8

Include holdings in Bibliographic Records

Retrieve Records

Record Bucket Export

Record Query | Pending Records | Bucket View

lee child | Bucket Actions | Contains 5 bucket items

Bucket # 215 lee child Owner: System Account (101010101010101) @ CONS

Remove Selected from Bucket | Add Selected to Pending Records

#	Author	Edition	ISBN	Publication Date	Publisher	TCN	Title
1	Child, Lee.		9780440339366 ...	c2012	Random House Pub...	695624	A wanted man : a Jack Reache...
2	Child, Lee.	1st large print ed.	9780739377673 ...	2010	Random House Lar...	695627	61 hours : a Jack Reacher novel
3	Child, Lee.		0399147268 (alk...	c2001	G.P Putnam's Sons	2904	Echo burning : a Jack Reacher ...
4	Child, Lee.		0385340559	2007	Delacorte Press	367	Bad luck and trouble : a Jack R...
5	Child, Lee.		0399146237 (aci...	c2000	G.P. Putnam's Sons	2727	Running blind

List Actions | Batch: | Show All in Catalog | Transfer Title Holds | Delete All Records | Merge All Records | MARC Batch Edit | Export All Records

Questions?

Thank you!