Batch Loading Bibs and On Order Items

MARC records with on order item data can be loaded through the MARC Batch Import/Export interface to create bibs and on order items in the catalog.

> ⚠ Loading MARC order records with on order item data requires some setup both on the Evergreen side and the vendor side. See **Setup for Batch Loading Bibs and On Order Items** for more information.

The MARC Batch Import/Export interface can be reached from either the **Portal page** or from the **Cataloging menu**. From either place choose **MARC Batch Import/Export (New Interface)**.

Loading a File of MARC Records

1. From the Cataloging menu go to **MARC Batch Import/Export (New Interface)**.

2. Check that your template is set. ❓ See **Setting Up Templates in MARC Batch Import/Export** for more information.

3. **Enter a unique queue name** in the box next to Select or Create a Queue.

Apply/Create Form Template	Load Records
Record Type	Bibliographic Records
Select or Create a Queue	*evp findaway 20220726*

4. Click the **Choose File** button and **select the MARC file** from your computer.

5. Click **Upload**
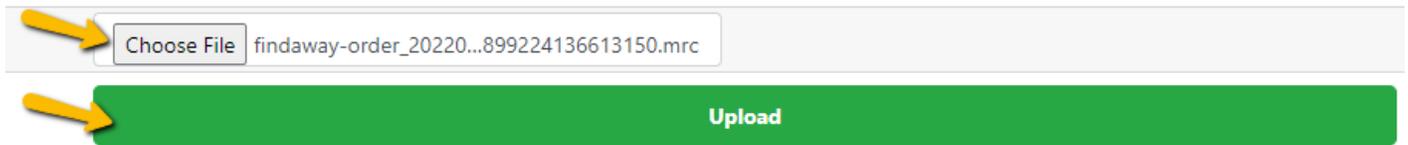
6. Evergreen will display the progress of the upload.

7. When all progress bars reach 100% a **Go To Queue** button will appear.

8. Click on the **Go To Queue** button.
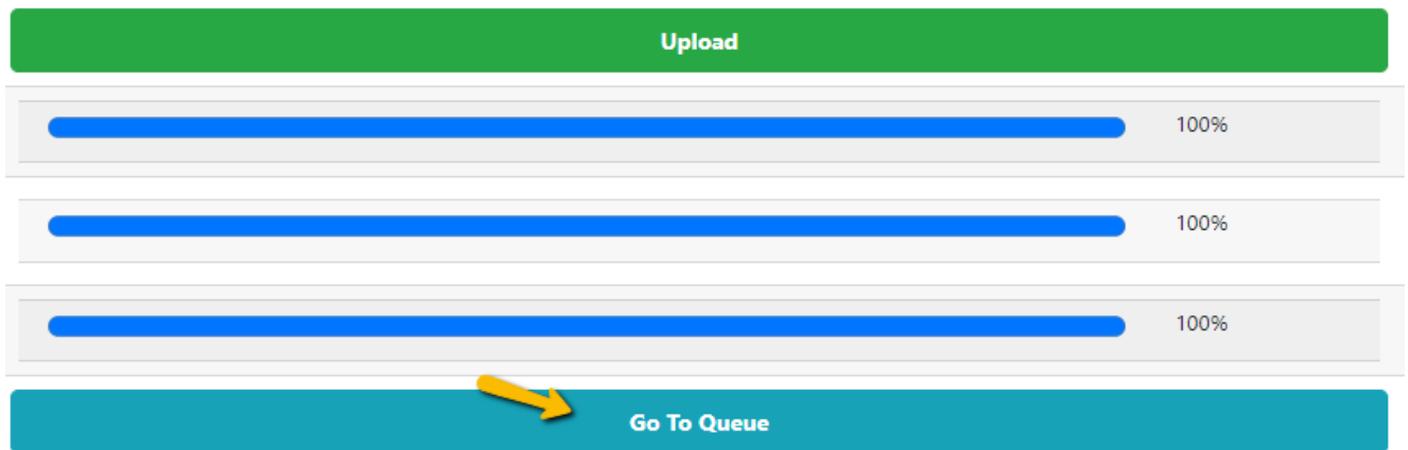
9. In the upper left side of the screen under **Queue Summary**, check that all records have loaded. ⚠️ If you see any import failures contact NOBLE.

Queue Summary			
Records in Queue:	10	Items in Queue:	10
Records Imported:	10	Items Imported:	10
Records Import Failures:	0	Item Import Failures:	0

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10. Under **Queue Actions** you can now either copy the records you uploaded to a bucket or delete the queue of records. ❓ Deleting the queue does not delete the records from the catalog. It is a good practice to delete a queue when you are done with it.

Copying the Queued Records to a Bucket

1. Under **Queue Actions** click **Copy Queue to Bucket**.

2. In the dialog box that appears, click on the **New Bucket** tab.

3. In the box to the right of **Name of New Bucket** enter a name for the bucket.

4. Click **Add to New Bucket**. ❓ Additional record uploads can be added an Existing Bucket by selecting the bucket from the dropdown in the Existing Bucket tab.

Add to New Bucket

Add to Existing Bucket

Deleting the Queue

Under **Queue Actions** click **Delete Queue** to remove the queue.

Load Another File

If you want to load another file, click on the **Import** tab at the top to import another file.

From:
<https://noblenet.org/documentation/> - **NOBLE Evergreen Documentation**

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https://noblenet.org/documentation/doku.php?id=batch_loading_bibs_and_on_order_items

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